

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

Contract for Monitoring and Evaluation services for Digital Skills for Jobs and Income (DS4JI)	Project number/ cost centre: 18.2132.1-001.00
---	--

0. List of abbreviations	2
1. Context.....	3
2. Tasks to be performed by the contractor	4
3. Concept.....	7
Technical-methodological concept	7
4. Personnel concept	8
Team leader	8
Expert 1.....	9
Expert 2.....	9
5. Costing requirements	10
Assignment of personnel	10
6. Inputs of GIZ or other actors	10
7. Requirements on the format of the bid.....	10
8. Data protection	12
9. Annexes	13

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
DS4JI	Digital Skills for Jobs and Income
GDPR	General Data Protection Regulation
HR	Human Resources
ToRs	Terms of reference
TVET	Technical and Vocational Educational and Training

1. Context.

The broad-based improvement of quality of vocational training in South Africa is a key area of the German Federal Ministry for Economic Cooperation and Development (BMZ). The Digital Skills for Jobs and Income project (DS4JI, **18.2132.1-001.00**, Duration: 2020 – 2024), **commissioned to GIZ by BMZ has four main objectives which aim to increase the employment prospects of young people in various sectors through a combination of the following**

- access to qualitatively improved and demand-oriented training through integration of digital competences and methods into the training courses of the formal TVET system, specifically at selected TVET colleges with a focus on young people, especially girls and women (Output 1),
- demand-oriented further training through financial and technical support of the respective service providers which will lead to an expansion of further training and networking measures and thus enable a larger number of young people to improve their employment prospects with regard to dependent or self-employed employment (Output 2),
- improved recruitment policies of companies through the introduction and implementation of new, gender-sensitive approaches to identifying applicants with the digital skills demanded by the company (Output 3),
- increased networking and cooperation of initiatives and actors and the exchange of learning experiences in the transformative process of digitization of the South African economy (Output 4).

At a higher level, improved employment prospects contribute to greater participation in political and economic life and thus also contribute to stabilization and a reduced potential for conflict, thus increasing social cohesion and reducing economic and social inequality. The project is funded by Federal Ministry for Economic Cooperation and Development (BMZ) and the *#eSkills4Girls* initiative.

Figure 1 below shows the targets for the four outputs areas for the DS4JI. This is the data that will be collected by the monitoring tool. This is illustrated by figure 1 below.



Figure 1 Output targets for DS4JI

**Both feed into module indicator 1: 50% of the total of 3000 participants in further training measures, 60% of whom are women, indicate that the employment prospects have improved with regards to one of five criteria.*

The assignment has three specific objectives, namely:

- (1) To conduct a tracer study on Module Indicator One which includes 3000 participants in formal and non-formal training and 250 women (a subset of the 3000) who were part of mentoring initiatives additional to training initiatives.
- (2) To oversee the collection of data and analysis for output three.
- (3) To design and administer a digital skills test for TVET trainees.

This will be done on a rolling basis from 1.11.2021 to 31. 03. 2024 by the appointed service provider. All three objectives seek to measure the impact of the project on employment perspectives of young people in an increasingly digitalised South African economy.

2. Tasks to be performed by the contractor

Under each objective listed above the following tasks will be performed under each objective:

2.1 Work package 1-Tracer study on Module Indicator 1:

The consultant will be responsible for designing, administering, and reporting on module indicator one, namely:

50% of the total of 3,000 participants in the supported basic and further training measures, of whom 60% are women, state that their employment prospects have improved with regard to one of five criteria.

- 2.1.1 The service provider will develop tools for data collection based on the criteria to be provided by GIZ. The tools will be approved by GIZ prior to use. Once the tools have been approved, the service provider will pilot the tools and amend where necessary.
- 2.1.3 The service provider will then conduct the data collection via email and follow up with telephone surveys and control data quality. Data will be collected 6 months after the training initiative has been completed. The service provider will also submit data quality control reports. The service provider will also manage data in accordance with General Data Protection Regulation (GDPR).
- 2.1.4 The service provider will develop case studies around mentees/mentors and other non-mentored participants not part mentoring initiatives to demonstrate impact of the project.
- 2.1.5 The service provider will report on findings 6 months after each training has taken place in line with GIZ reporting requirements and timelines. The service provider will also submit an annual project report also in line with GIZ reporting requirements. The provider will also submit a final consolidated report on the tracer study findings with data aggregated from all service providers.

2.2 Work package 2-To oversee the data collection, analysis and reporting for output 3:

The consultant will be responsible for overseeing the indicators under output 3, namely:

1. *Output indicator 3.1: 500 representatives of South African companies (of which 30% are run by women) demonstrate based on a specific example that they have used new HR instruments introduced with the help of e-training courses.*
2. *Output indicator 3.2: 150 HR managers at South African companies, of whom 50% are women, demonstrate based on a specific example that gender sensitivity in their HR processes has improved.*

- 2.2.1 The service provider will develop an online skills test for HR representatives based on the criteria provided by GIZ. The tools will be approved by GIZ prior to use. The service provider will pilot the tool and amend if necessary. (Output 3.1)
- 2.2.2 The service provider will conduct a qualitative study of HR managers. Data collection tools will be based on GIZ criteria and shall be subject to approval by GIZ. The tool will be piloted and amended if necessary. (Output 3.2)

- 2.2.3 For both indicators above, the service provider will conduct data collection and data quality controls checks. Reports on data quality will be submitted to GIZ. Data protection must also be ensured in line with GDPR.
- 2.2.4 The service provider will develop case studies around HR managers that demonstrate the impact of the project.
- 2.2.5 The service provider will report on findings in line with GIZ reporting requirements and timelines.

NB: There is a possibility that this output may change. Changes will be discussed with appointed service provider.

2.3 Work package 3- To design and administer a digital skills test for TVET trainees:

The consultant will be responsible for designing and administering a digital skills test for output indicator 1.2, namely:

1000 trainees of whom 60% are women, in three selected (dual) training courses at TVET colleges demonstrate in a test that they have improved their digital skills that are relevant for employment.

- 2.3.1 The service provider will design a digital skills test for 1000 students in TVET colleges. The test will be developed in line with GIZ criteria and will be approved by GIZ prior to use. The test will be piloted and amended if necessary. The test will be administered by the service provider and must ensure data confidentiality. The anonymised data will be submitted to GIZ for analysis.

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

Milestone	Deadline/person responsible
Project kick-off meeting	1.11.2021/GIZ and Service provider
Designing of data collection tools	15.12.2021/Service provider
Start of data collection and analysis	15.01.2022/Service provider
Reports on findings for each service provider/consolidated report with aggregated data	6 months after each training initiative and consolidated report/service provider
Project reporting	1.11.2022-2023/Service provider
Project close-out	31.01.2024/Service provider

- Period of assignment: From 1.11.2021 until 31. 01. 2024 .

2.4 Eligibility Criteria for bidders

Below are the eligibility criteria that will be used to select the service provider.

- Average turnover for the last three (3) financial years at least **200.250 EUR;**

- Minimum number of employees in the previous financial year must be **five (5)**;
- Technical eligibility assessment will be assessed on the following:
 1. Reference projects with a minimum **commission value of 50 000EUR**
 2. At least five **(5) reference projects** in the field of **monitoring and evaluation** and at least two **(2) reference projects** in **Southern Africa** in the last 3 years.
- The weighted criteria for assessment will be as follows:

1. Technical experience	Weighting in %
1.1 Monitoring and evaluation	30
1.2 Tracer studies	20
1.3 Research	15
1.4 Project management	5
Subtotal for technical experience	70
2. Regional Experience	20
3. Experience of development projects (at least 50% ODA-financed)	10
Overall total	100%

3. Concept

In the concept, the bidder is required to show how the work packages and their objectives defined in Chapter 2 are to be achieved. In addition, the bidder must also describe the steering structure of the project, the gender strategy, personnel management plan and the processes to achieve the objectives of the assignment. 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).

3.1 Technical-methodological concept

Overall, the technical-methodological concept should comprise not more than 10 pages. The number of pages per chapter are indicative.

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). Then the bidder must present and justify the strategy with which it intends to provide the services for which it is responsible (see Chapter 2) (max. 5 pages). The bidder is expected to provide an analytical approach and data collection methodology as part of their strategy. The bidder must also demonstrate an

understanding of tracer studies and the skills eco-system in South Africa. The bidder must present innovative approach to work package 2.

Steering: The bidder is required to present and explain its approach to steering the measures with the service providers and other stakeholders and its contribution to the results-based monitoring system. (max.1 page)

Processes: 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 2 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 2. (max.2 pages)

Gender sensitivity strategy: The bidder is required to provide a strategy of how they will ensure gender sensitivity during the data collection phase. The majority of target beneficiaries of DS4JI are females, as such sensitivity needs to be ensured when collecting and analysing data. (max.1 page)

Personnel assignment plan: 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) of the individual members of the team complete with the allocation of work steps as set out in the schedule. The bidder must also provide a similar assignment plan for data capturers. (max.1 page)

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

- The lead consultant has the overall responsibility for the work packages of the contractor (quality and deadlines) and for personnel management.
- He/she is coordinating and managing the project and ensuring communication with GIZ, partners and others involved in the project. The lead consultant is responsible for results and reporting in accordance with deadlines.
- Personnel management, in particular identifying the need for short-term assignments within the available budget, as well as planning and steering assignments and supporting short-term assignments.
- Regular reporting in accordance with deadlines

Qualifications of the team leader

- Qualifications (2.1.1): Masters' degree in Development Studies, Economics, International Relations or Equivalent
- Language (2.1.2): Good business language skills in English
- General professional experience (2.1.3): 10-15 years of professional experience
- Specific professional experience (2.1.4): 10 years in consulting programmes in the TVET/skills development sector in South Africa
- in a management position

- Leadership/management experience (2.1.5): 6 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 South Africa.
- Development Cooperation (DC) experience (2.1.7): 6 years of experience in DC projects

Expert 1

Tasks of expert 1

- Assist team lead with work package 2 and 3
- Development of data collection tools and digital skills test
- Ensure data quality
- Ensure data is managed in line with GDPR guidelines
- Data analysis and report writing

Qualifications of expert 1

- Education/training (2.2.1): Honour's degree in Development Studies, Economics, International Relations, Monitoring and Evaluation. Masters preferable
- Language (2.2.2): Good business language skills in English
- General professional experience (2.2.3): 5-10 years of professional experience
- Specific professional experience (2.2.4): 5-10 years of experience in Monitoring and Evaluation of projects
- Leadership/management experience (2.2.5): 3-5 years of experience in management
- Regional experience (2.2.6): 3-5 years' experience in the South African skills eco-system
- Development Cooperation (DC) experience (2.2.7): 3 years of experience in DC cooperation

Expert 2

Tasks of expert 2

- Assist team lead with work package 1
- Development of data collection tools
- Ensure data quality
- Ensure data is managed in line with GDPR guidelines
- Data analysis and report writing

Qualifications of expert 2

- Education/training (2.3.1): Honour's degrees in Development Studies, Economics, International Relations, Monitoring and Evaluation. Masters preferable
- Language (2.3.2): Good business language skills in English
- General professional experience (2.3.3): 5-10 years of professional experience
- Specific professional experience (2.3.4): 5-10years experience in large scale research studies
- Leadership/management experience (2.3.5):3-5 years' experience in management
- Regional experience (2.3.6):3-5 years' experience in the South African skills eco-system
- Development Cooperation (DC) experience (2.3.7): 3 years of experience in DC cooperation

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
- Gender sensitivity

5. Costing requirements

Assignment of personnel

Team lead: 80 days for planning and overseeing data collection and analysis and reporting, quality control

Expert 1: 185 days for tool development, data collection and analysis and reporting

Expert 2: 185 days for tool development, data collection and analysis and reporting

Travel: All the work will be desk-based at the consultant's usual place of work. There is no need for travel. All communication with the GIZ will be held online via MS Teams. If essential, travel for data collection or interviews might be possible. This is at the discretion of the service provider and must be in line with COVID-19 regulations.

6. Inputs of GIZ or other actors

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

- Information about the project and existing monitoring concepts and practices
- Meeting logistics
- Regular consultations and clarification of questions as needed

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 to be drawn up in English.

The technical-methodological concept 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 must also be submitted in English.

The bidder must also provide examples of five (5) similar scope and size through a brief description of the project, the dates and who the services were provided for.

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.

Other Requirements

- Please submit your proposal (technical and price proposal) in separate files/folder to ZA_Quotation@giz.de no later than 30.07.2021, 23h00 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 LSL
- 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

8. Data protection

Personal data collected by GIZ may be entrusted to the contractor in order to fulfil the contract. The contractor is obliged to protect this data under the standards of the GDPR, in particular the Art. 44-50 GDPR. 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 data protection legislation.

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

9. Annexes

Results model

Annex 2: Results logic for a module
Digital Skills for Jobs and Income in South Africa
Project number 2018.2132.1

