

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

National Pathway Management Network (NPMN) Panel Study	Project number/ cost centre:
	20.2210.1-001.00

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0. List of abbreviations

AVB	General Terms and Conditions of Contract for supplying services and work
BMZ	German Federal Ministry for Economic Cooperation and Development
CEFRL	Common European Framework of Reference for Languages (CEFRL)
DEL	Department of Employment and Labour
DHET	Department of Higher Education and Training
GDPR	Regulation (EU) 2016/679 (General Data Protection Regulation)
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH
NPMN	National Pathway Management Network
NYDA	National Youth Development Agency
PMO	Programme Management Office
POPIA	Protection of Personal Information Act
PYEI	Presidential Youth Employment Intervention
S2PYEI	Support to the Presidential Youth Employment Intervention
ToRs	Terms of reference

1. Context

1.1 Project description

On behalf of the German Federal Ministry for Economic Cooperation and Development (BMZ), the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH implements the project “Support to the Presidential Youth Employment Intervention (S2PYEI)”. The project supports the Programme Management Office (PMO) at the Presidency of the Republic of South Africa in the coordination and implementation of the PYEI.

In doing so, the programme works along two main strains of activity:

- (1) Supporting the PMO in coordinating the PYEI and developing its governance structures and
- (2) Strengthening the capacities of PYEI implementing organisations.

1.2 Presidential Youth Employment Intervention

The President launched the PYEI in 2020 as a direct response to the challenge that too many young people are not transitioning from learning to earning. The PYEI is South Africa’s most comprehensive effort yet to address this crisis. To this end, the intervention brings together the strengths of numerous government institutions and social partners to deliver more opportunities for young people. It seeks to coordinate, accelerate, and enhance existing programmes. The PYEI also drives innovation and creates pathways to earning for young people at scale. The PYEI is comprised of four components: Demand-led skills development, Local Ecosystem Enablement, National Youth Service, and the National Pathway Management Network (NPMN). More information on the PYEI can be accessed at www.stateofthenation.gov.za.

1.3 The National Pathway Management Network

The NPMN brings together all networks that serve young people not in employment or training, aggregating learning and earning opportunities. This creates a single-entry point for young people and opportunity holders alike to share, view and access opportunities in the economy including a wide range of support services. The NPMN is enabled by the SA Youth platform, which can be accessed for free online as well as through the infrastructure of Department of Employment and Labour (DEL) and the National Youth Development Agency (NYDA) at community levels. The NPMN also provides continuous support to young people finding their way into the economy, for instance through the Khetha career guidance platform. The mPowa app links young people to relevant services in their communities. For some young people, this can be a starting point for personal development and initial workplace experience. For others, the NPMN may provide direct linkages to employment or enterprise support.

1.3.1 Objectives of the NPMN

The objectives of the NPMN are as follows:

- **Accelerate the creation of new opportunities for young people** by: (i) identifying and implementing interventions to unlock growth opportunities that will absorb new entrants at scale (e.g., in the care and social economy, and agricultural as well as digital

and technology sectors); (ii) developing public and private sector partnerships for joint planning and delivery; and (iii) changing policy, regulations and incentives to improve labour absorption by the private sector.

- **Aggregate the supply of, and demand for learning and earning opportunities for young people on to one central place.** The NPMN consolidates existing opportunities in one place. It aims to become the go to platform both for young people and opportunity holders that want to reach them. To this end, the NPMN works towards making existing platforms interoperable.
- **Address barriers young people experience when looking for opportunities.** Such barriers include high data costs, lack of access to personalized counselling, qualifications that are not aligned to market needs, and insufficient information about available support services and resources.
- **Support young people to grow their skills and employability.** By using the NPMN, they can access a wide range of relevant employment services and learning opportunities. This allows young people to embark on a long-term growth path towards goals that align with their preferences and strengths.
- **Generating data to guide future support.** The NPMN provides nuanced information on the skills held by the young people developing their profiles on the network and how they compare to what employers are looking for. This can help service providers adapt training offerings and develop tailored bridging interventions.
- **Ensure that the various platforms that form the NPMN are interoperable,** meaning, accessing one platform will show all the opportunities that are available across all the various platforms.

1.3.2 Facts about the NPMN

The NPMN has been in operation since 2020. To date, the platform has 4.1 million registered youth and 892 opportunity holders. The NPMN is composite “network of networks”, please see annexure 1 for more details.

1.4 About the NPMN panel study

1.4.1 Rationale of the NPMN panel study

The purpose of the panel study is to provide insight into the pathways of young people in and out of various opportunities in the labour market such as employment, training, work seeker support and forms of enterprise.

The objectives of the NPMN is to create a single-entry point for young people to access learning and earning opportunities. A secondary reason is to provide insight into the pathways into sustainable earning opportunities. The study will be conducted annually to build an understanding of how young people move through the labour market towards sustainable long-term earning opportunities. The data will be used to develop targeted interventions based on the data that is generated from young people. In addition, the data will be used to contribute towards understanding the impact of the PYEI.

1.4.2 High level research questions

Below are the high-level research questions:

Questions on young people:

- What type of earning opportunities are young people taking up?
- How long are young people staying in these opportunities?
- On average, how often are young people transitioning into other opportunities?
- What is the profile of young people who are succeeding in accessing and keeping these earning opportunities? E.g., qualification levels, gender, provincial breakdown etc.
- What, if any, are the differences in the profiles of young people across the network?
- What types of learning, support and volunteering opportunities are young people accessing and to what extent does this seem to be a factor in terms of level of success realized by the young person (in securing and keeping the earning opportunities)?
- What barriers are young people facing when seeking to access and progress in the labour market?
- What different pathways emerge across the network? Which lead to sustainable earning?

Analysis will be based on the following sub-groups: gender, age category, location (rural/ urban and peri-urban), education level (the contractor will make a recommendation on the categories for disaggregation) and people with disabilities.

Questions on opportunity holders:

- What kind of opportunities are opportunity holders adding to the network?
- What, if any, are the differences between the earning opportunities accessed across the different partners in the network and in terms of the pathways to earning, that is, what learning, and support opportunities are accessed towards gaining the earning opportunity?
- What is the relationship between the types of opportunities added into the network and the pathways into sustainable employment?

Bidders are expected to measure and demonstrate the effects of the NPMN and compare these effects to those who are not on the network using relevant methodologies.

1.5 Project approach

The study will be a longitudinal study which will take place annually once a year between 2023 and 2024 surveying the same group of young people and opportunity holders. This ToR refers to the first round of the survey in 2023, with an option for an extension of the contract to include a second round of the survey towards the end of 2024.

2. Tasks to be performed by the contractor

The contractor will be responsible for conducting a panel study as described in section 1.4 above, answering the research questions (see 1.4.2). The evaluation comprises the following work packages:

Work package 1: Initial project inception

At the commencement of the project, the contractor will be responsible for providing a detailed research plan and inception report based on the inception meeting. The inception report must include the methodological approach to measure and demonstrate the effects of the NPMN and compare these effects to those who are not on the network through the use of relevant methodologies and timelines agreed upon in the inception meeting.

Work Package 2: Data collection and analysis

Data collection instruments design: The contracted service provider will develop the data collection instruments to be used for review and inputs of GIZ. The final approval for the use of the data collection instruments will be made by GIZ. The contractor will be expected to pilot the data collection tools before use and make amendments where necessary.

Data collection: The contractor will be responsible for data collection using suitable methods. Where interviews are conducted, the contractor will be expected to provide anonymised summaries of interviews with participants.

Data analysis: The contractor will be responsible for analysis of the data. Where quantitative approaches are used, appropriate statistical analysis software should be utilised.

Work Package 3: Reporting and closeout

Draft report and presentation workshop: The contractor will prepare an initial, draft report. Upon the completion of the draft report, the contractor will be responsible for circulating the report and organizing a workshop to discuss key findings and recommendations. The draft report should be no more than 30 pages, excluding the cover page, contents and references. The workshop will take place in a hybrid format.

Final report: The contractor will be responsible for compiling the final report which will incorporate the feedback from the workshop.

Closeout report: When the final report has been approved by the steering group, the contractor will provide a project closeout report. The closeout report will detail important project aspects, record variances around the timelines, scope, and reporting timelines.

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

Milestones/process steps/partial services	Deadline/place/person responsible
Submission of the inception report	2 weeks after the start of the contract
Submission of the data collection tools	6 weeks after the start of the contract
Submission of preliminary findings (report and presentation)	2 months after the submission of data collection tools

Final report based on GIZ feedback (report and presentation)	1 month after receiving GIZ feedback
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Period of assignment: from 01 November 2023 until 31 March 2024.

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 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 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). The bidder is expected to provide information on the research approach and appropriate methodology as part of the strategy. Bidders are expected to measure and demonstrate the effects of the NPMN and compare these effects to those who are not on the network through the use of relevant methodologies. The proposed methodology must include the approach to this. In relation to this approach, the bidder must also state their approach to ethical considerations. The bidder must also demonstrate an understanding of the PYEI and the NPMN.

The bidder is required to present and explain its approach to **steering** the measures with the project partners (1.3.1).

The bidder 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 (1.4.2). The bidder must describe how integration of partner contributions will be done

Project management of the contractor (1.6)

The tenderer is required to explain its approach for coordination with the GIZ project. In particular, the project management requirements specified in Chapter 2 (Tasks to be performed by the contractor) must be explained in detail.

- The contractor is responsible for selecting, preparing, training and steering the international and national, short and long-term experts assigned to perform the advisory tasks.
- The contractor provides 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 current AVB of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH.

The tenderer is required to draw up a **personnel assignment plan** with explanatory notes that lists all the experts proposed in the tender; the plan includes information on assignment dates (duration and expert months) and locations of the individual members of the team complete with the allocation of work steps as set out in the schedule.

4. Personnel concept

The tenderer is required to provide personnel who are suited to filling the positions described, on the basis of their CVs (see Chapter 6), 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

- The lead consultant has the overall responsibility for the work packages of the contractor (quality and deadlines) and for personnel management.
- They are 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, 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

- Education/training (2.1.1): University degree (Masters) in Monitoring and Evaluation, Development Studies, Social Sciences or Economics or any other relevant field
- Language (2.1.2): C1-level language proficiency according to the Common European Framework of Reference for Languages (CEFR)
- General professional experience (2.1.3): 10 years of professional experience in the evaluation and research sector
- Specific professional experience (2.1.4): 5 years of experience in quantitative and qualitative research
- 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): 10 years of experience in projects in South Africa

Key expert 1

Tasks of key expert 1

- Expert 1 will assist the team lead with the overall project design and implementation, e.g. by development of data collection tools, data analysis and reporting, ensuring data quality and ensuring data is managed in line with data protection guidelines and ethical research standards.

Qualifications of key expert 1

- Education/training (2.2.1): University degree (Masters) in Monitoring and Evaluation, Development Studies, Social Sciences or Economics or any other relevant field

- Language (2.2.2): C1 -level language proficiency according to the Common European Framework of Reference for Languages (CEFRL)
- General professional experience (2.2.3): 8 years of professional experience in the evaluation and research sector
- Specific professional experience (2.2.4): 5 years of experience in quantitative research methodologies (experimental, quasi-experimental or similar)
- Regional experience (2.2.6): 8 years of experience in projects in South Africa

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

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

For the technical assessment, an average of the qualifications of all specified members of the expert pool is calculated. Please send a CV for each pool member (see below Chapter 7 Requirements on the format of the bid) for the assessment.

Tasks of the short-term expert pool

The pool of short-term experts' duties will be to support the Team leader and expert 1 doing the following:

- Support data collection
- Support data analysis
- Support reporting writing

Qualifications of the short-term expert pool

- Education/training (2.6.1): All experts with university qualification (Honours degree or above) in Monitoring and Evaluation, Development Studies, Social Sciences or Economics
- Language (2.6.2): All experts with C1-level language proficiency according to the Common European Framework of Reference for Languages (CEFRL)
- General professional experience (2.6.3): All experts with 3 years of professional experience in the evaluation and research sector
- Specific professional experience (2.6.4): All experts with 1 years of professional experience in quantitative research methodologies (experimental, quasi-experimental or similar)
- Regional experience (2.6.5): All experts with 3 years of experience in South Africa

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

5. Eligibility Criteria

The bidder should fulfil following minimum eligibility criteria:

5.1 Commercial register entry

5.2 Average annual turnover for the last three financial years of at least R 1,190,000 (€ 60,000)

5.3 Number of employees and managers in the previous calendar year: At least 3 persons

5.4 The bidder must also provide examples of three (3) projects (research and evaluation) and at least three (3) projects in South Africa with a minimum commission value of R 595,000 (€ 30,000) in the past 3 years through a brief description of the project, the dates and who the services were provided for.

6. Costing requirements

Assignment of personnel and travel expenses

For travel costs the maximum rates for per diems, accommodation, flight costs etc. can be taken from the table below.

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.

Specification of inputs

Fee days	Number of experts	Number of days per expert	Total	Comments
Designation of TL	1	20	20	
Designation of key expert	1	20	20	
Designation of short-term expert pool	2	30	60	
Travel expenses	Quantity	Price	Total	Comments
Fixed travel budget	1	R 100,000	R 100,000	This budget is earmarked for travel within South Africa, covering per diem (R 490 per day), overnight allowance (R 1,500 per night), flights, CO ₂ compensation, car rental, taxi and other travel expenses.

				Settlement is possible against evidence and only until the budget is depleted.
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Payment

The contractor will submit invoices on a quarterly basis for the work performed in the respective quarter. The contractor will use timesheets to account for the performance.

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 4) 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 (language).

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 5 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. CVs must also include at least one example of the type of research required in categories for general and specific experience.

Please calculate your financial tender based exactly on the parameters specified in Chapter 6 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.

8. 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

In the contract extension, another study such as the one conducted in 2023 will be conducted in 2024 to collect information on changes in the study group.

The services for which the contractor is responsible are the same as described in Chapter 2 above.

Requirements

The following prerequisites would need to be in place for the additional services to be carried out by the contractor:

- Exercising the option will depend on the extension of the S2PYEI project by the commissioning party BMZ.
- Successful completion of the 2023 longitudinal study phase
- GIZ is satisfied with the performance of the contractor.

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	20	20	
Designation of key expert	1	20	20	
Designation of short-term expert pool	2	30	60	
Travel expenses	Quantity	Price	Total	Comments
Fixed travel budget	1	R 100,000	R 100,000	This budget is earmarked for travel within South Africa, covering per diem (R 490 per day), overnight allowance (R 1,500 per night), flights, CO2 compensation, car rental, taxi and other travel expenses. Settlement is possible against evidence and only until the budget is depleted.

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.

9. Outsourced processing of personal data

The performance of the contract may be associated with the processing of personal data by the contractor, who would alone define the nature of such data and how such processing would be carried out. In such cases, the contractor shall act as an independent data controller and must alone comply with all applicable data protection obligations, including those stemming from regional and local laws (e.g. the Protection of Personal Information Act, POPIA).

The contractor must process personal data only when a given goal cannot be reasonably attained without such data. The data protection principles such as lawfulness, data minimization, accuracy, purpose limitation, storage limitation, transparency, integrity and

confidentiality, and accountability, as well as the numerous rights of the data subject must be paid due attention. The European Union's General Data Protection Regulation's (GDPR) data transfer rules must be considered whenever personal data leaves the EU for a third country. In case the contractor executes the instructions of a partner to the GIZ with regard to such processing, the partner shall be the data controller, and the data processing shall be carried out in accordance with the laws and standards to which the partner is subject. The GIZ is not in any way responsible for such processing.

Where the contractor is not subject to the GDPR and the applicable laws do not contain any explanation on the data protection principles and rights mentioned here, the definitions and meanings provided by the GDPR (Regulation (EU) 2016/679) could be helpful. The GIZ is available to support the contractor whenever need arises.

Only anonymised data will be provided to GIZ and its partners.

The contractor will also adhere to relevant ethical research standards including informed consent and confidentiality requirements.

10. Annexes

- National Pathway Management Network (NPMN) Fact Sheet

11. Other Requirements

- Please submit your proposal (technical and price proposal) in separate files/folder to ZA_Quotation@giz.de no later than **29th 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.**