

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




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| <b>Service Provider to Provide Consulting Fee Grid</b> | <b>Project number/<br/>cost centre:<br/>96.9250.0.001.00</b> |
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## **0. List of abbreviations**

|      |   |
|------|---|
| AG   | Commissioning party   |
| AN   | Contractor  |
| AVB  | General Terms and Conditions of Contract for supplying services and work 2022 |
| FK   | Expert  |
| FKT  | Expert days   |
| KZFK | Short-term expert   |
| ToRs | Terms of reference  |

## 1. Context

The Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH is a federally owned enterprise of the German Government. GIZ operates in more than 120 countries around the world and has been present in South Africa since 1993.

GIZ works on bilateral projects in the core areas of 1) Peace and Security, 2) Energy and Environment, 3) Economic Development, and 4) Employment Promotion. There are approximately 270 people currently working for GIZ in South Africa, Lesotho, and Eswatini. For more information on our 3 countries visit: <https://www.giz.de/>.

There are approximately 270 people currently working for GIZ in South Africa, Lesotho, and Eswatini. For more information visit: [www.giz.de/southafrica](http://www.giz.de/southafrica). The GIZ South Africa, Lesotho, and Eswatini Country Office (CO) invites a competent, experienced, and innovative consultancy to conduct a comprehensive market survey for the purpose of establishing the “schedule of fees” for Service Contracts companies and appraisers. The rates established need to be in line with prevailing market rates for similar work of comparable quality, complexity and difficulty, with a clear methodology for extrapolation. These services within GIZ are classified under Consulting services.

The fee grid established must be applicable across the three countries within the scope of the ZA CO: South Africa (ZA), Lesotho (LS), and eSwatini (ESW).

## 2. Tasks to be performed by the contractor

The service provider is to provide guidelines and a working tool that will serve as a model that the GIZ country office can make use of on a continuous basis to monitor and update the established market rates. The tool proposed and methodology developed must enable GIZ to stay abreast with market trends and retain its knowledge of market movements.

GIZ will provide an outline of the minimum areas of expertise where the average rates or fees are required, at five levels of expertise.

The contractor is responsible for providing the following services:

- Providing GIZ ZA, LS, and ESW with a comprehensive study on rates charged by professionals/experts in different sectors and industry;
- Render advisory services to GIZ on how GIZ can align their consultancy fee schedule to market and industry standards;
- Ensure a transferral of the know-how in terms of adjusting the developed tool to macroeconomic and exogenous variable factors and therefore ensuring relevance thereof on a continuous basis;
- The contractor is responsible for selecting and preparing methods to be used during their research;
- The contractor provides own equipment necessary to ensure the success of the project 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 General Terms and Conditions for Contracts 2022, of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH.

## 2.1 Fee Schedule

Within the time frame specified, the Consultancy is expected to submit a report which includes, but not limited to, the following outputs:

- Details and summary of data collected from the comparators showing the evaluation of their fee structure
- The minimum and maximum fees of all job matches obtained from the comparators, reflecting the different levels of qualification and experience in Table 1 below: Level 1, Level 2, and Level 3. Level 4, and Level 5 are considered special rates/fees, the criteria for which must be clarified by the Consultant. Each level should contain a minimum and maximum threshold of fees.
- A report on final survey findings with comparison and analysis of the survey results, and recommendations related to the fees paid is required.
- The recommendations should include different categories for which different fees are paid (for instance moderation, technical advice for environment programs technical advice for economic development programmes, climate and energy sector programmes, etc.)
- The Consultancy shall maintain complete confidentiality of all data and documents provided by GIZ.

| Sector Title   | Junior Consultant | Consultant   | Senior Consultant    | Chief Consultant | Principal Consultant |
|--|-------------------|--------------|----------------------|------------------|----------------------|
| Professional experience required in the specialist area to provide the service | Up to 3 years     | 4 to 7 years | ≥ 7 years ≥ 10 years | ≥ 10 years       | ≥ 15 years           |
| Qualification level  | Level 1           | Level 2      | Level 3              | Level 4          | Level 5              |

Table 1: Levels of Consultant Expertise based upon Qualification and Experience

An overview of the areas of Expertise for Contract Award are outlined below in Table 2. GIZ will provide further details and breakdown for each thematic area, to the relevant service provider appointed to undertake the work.

| Sector of Expertise for Contract Award             | Level 1      | Level 2      | Level 3              | Level 4    | Level 5    |
|--|--------------|--------------|----------------------|------------|------------|
|  | Up to 3 year | 4 to 7 years | ≥ 7 years ≥ 10 years | ≥ 10 years | ≥ 15 years |
|  | Up to Max    | Max          | Max                  | Max        | Max        |
| 1 Organisational and management consulting         |              |              |                      |            |            |
| 2 Personnel selection, management and training     |              |              |                      |            |            |
| 3 Rural development, agriculture, fishing and food |              |              |                      |            |            |
| 4 Natural resources, biodiversity, oceans/coasts   |              |              |                      |            |            |

|    |   |               |            |           |                         |  |  |  |  |  |
|----|---|---------------|------------|-----------|-------------------------|--|--|--|--|--|
| 5  | Energy and transport and climate change                       |               |            |           |                         |  |  |  |  |  |
| 6  | Communication, multimedia and social media                    |               |            |           |                         |  |  |  |  |  |
| 7  | Private sector development and economic policy                |               |            |           |                         |  |  |  |  |  |
| 8  | Crises, conflicts, disasters, displacement and migration      |               |            |           |                         |  |  |  |  |  |
| 9  | Digitalisation  |               |            |           |                         |  |  |  |  |  |
| 10 | IT implementation and operation                               |               |            |           |                         |  |  |  |  |  |
| 11 | Vocational education and youth                                |               |            |           |                         |  |  |  |  |  |
| 12 | Financial systems and insurance                               |               |            |           |                         |  |  |  |  |  |
| 13 | Social protection and health                                  |               |            |           |                         |  |  |  |  |  |
| 14 | Democracy, decentralisation, urban development                |               |            |           |                         |  |  |  |  |  |
| 15 | Public finance and administration, anti-corruption, integrity |               |            |           |                         |  |  |  |  |  |
| 16 | Rule of law, human rights & gender, security                  |               |            |           |                         |  |  |  |  |  |
| 17 | Environmental management, water, waste, resource efficiency   |               |            |           |                         |  |  |  |  |  |
| 18 | Legal consulting, external and internal auditing              |               |            |           |                         |  |  |  |  |  |
| 19 | Translation and interpreting services                         |               |            |           |                         |  |  |  |  |  |
|    | Rate per day  |               |            |           |                         |  |  |  |  |  |
|    | Rate per standard line  |               |            |           |                         |  |  |  |  |  |
|    | Rate per hour   |               |            |           |                         |  |  |  |  |  |
| 20 | Planning and architectural services                           | Up to 5 years | 5-10 years | ≥10 years | Special appraiser/owner |  |  |  |  |  |

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

| Milestones/partial works  | Deadline/place/person responsible | Criteria for acceptance  |
|---|-----------------------------------|--|
| <ul style="list-style-type: none"> <li>Inception report</li> </ul>                  | 20 June 2024                      | <ul style="list-style-type: none"> <li>Clear methodology and concept on how the data will be collated and analysed.</li> </ul>   |
| <ul style="list-style-type: none"> <li>Interim Report</li> </ul>                    | 20 July 2024                      | <ul style="list-style-type: none"> <li>Draft final report.</li> <li>Presentational tool and guidelines</li> </ul>  |
| <ul style="list-style-type: none"> <li>Final report with recommendations</li> </ul> | 30 August 2024                    | <ul style="list-style-type: none"> <li>Breakdown of different rates according to qualification level and sector industries</li> <li>Conclusive report on research finding a recommendations</li> <li>Tool for future forecasting and guidelines on its application.</li> </ul> |

Period of assignment: from 20 June 2024 until 30 August 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 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).

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**.

The tenderer 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 tender in accordance with the GTCC 2022:

- Service-delivery control
- Managing adaptations to changing conditions
- Ensuring the flow of information between the tenderer and GIZ
- Assuming personnel responsibility for the contractor's experts
- Process-oriented steering for implementation of the commission
- Securing the administrative conclusion of the project
- 

#### **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

- 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 degree (Diploma'/Master) in Business Administration.
- Language (2.1.2): C2-level language proficiency in English

- General professional experience (2.1.3): 15 years of professional experience in the Management Consultancy/Recruitment and Selection sector.
- Specific professional experience (2.1.4): 10 years in Human Resource Management/Payroll Administration/Remuneration Database Management
- Leadership/management experience (2.1.5): 5 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 Southern Africa/SADC (region), of which 2 years in projects in South Africa (country)
- Development cooperation (DC) experience (2.1.7): 3 years of experience in DC projects N/A
- Other (2.1.8): *Examples*: evidence of participation in Capacity WORKS training (can be completed at a later date), experience in financial management N/A

#### Soft skills of team members

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

- Emotional intelligence, interpersonal, and relationship building skills,
- Solution and client-oriented approach to problem solving,
- Excellent communication and cultural awareness skills,
- Adaptability, flexibility, and responsiveness,
- Data gathering, analysis, and modelling,
- Consulting, collaboration, and business management,
- Project planning, management, schedule organisation, and efficiency,
- Interdisciplinary and Critical thinking.

#### **Short-term expert pool with minimum one, maximum two 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

- Support team leader with overall responsibility for the advisory packages of the contractor (quality and deadlines)
- Carry out tasks as laid out in Chapter 2, including the design of communication material, travel logistics, and facilitation of the event
- Qualifications of the short-term expert pool
- Education/training (2.6.1): 1 expert with university qualification in HR recruitment management (Master or equivalent), at least 1 expert with university qualification in statistic (Master or equivalent)
- Language (2.6.2): A1 -level language proficiency in English
- General professional experience (2.6.3): 1 expert with 5 years of experience in the Human Resources sector, 1 expert with 5 years of professional experience in the statistic/database management sector
- Specific professional experience (2.6.4): 1 expert with 5 years of experience in management of recruiting processes, profiling, data collection, data analysis. Specialization in reporting and ranking is an asset.

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



Qualifications of the short-term expert pool

- Education/training (2.6.1): 1 experts with university qualification in HR recruitment management (Master or equivalent) at least 1 experts with university qualification in statistic (Master or equivalent)
- Language (2.6.2): A1-level language proficiency in English
- General professional experience (2.6.3): 1 experts with 5 years of experience in the Human Resources sector, 1 experts with 5 years of professional experience in the statistic/database management sector
- Specific professional experience (2.6.4): 1 experts with 5 years of experience in, management of recruiting processes, profiling, data collection, data analysis.
- Specialization in reporting and ranking is an asset.

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

**5. Costing requirements**

Travel is not anticipated as part of the Assignment. The Consultants are expected to conduct all of the work remotely and present it to GIZ upon completion.

**0 Contracts for works:**

The following basic calculations for the contract for works are a reference value based on the acceptance criteria for each partial work/milestone specified in Chapter 2 (Tasks to be performed by the contractor).

Since the contract to be concluded is a contract for works, we would ask you to offer your services at a lump sum price. Therefore, please divide the lump sum price into the milestones described below. The price per milestone must contain all relevant costs (fee, travel expenses etc.).

In addition, the assessment of the financial bid is also based on the underlying daily rate. Please also provide the underlying daily rate. A breakdown of days is not required.

| <b>Milestones/partial works</b> | <b>Estimated expert days for orientation</b> | <b>Deadline/place/person responsible</b> |
|---------------------------------|--|--|
| Inception Report                | 15 days                                      | 31 <sup>st</sup> June 2024               |
| Interim Report                  | 20 days                                      | 30 <sup>th</sup> July 2024               |
| Final Report                    | 25 days                                      | 30 <sup>th</sup> August 2024             |
|                                 |  |  |

**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 (language).

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. The CVs must be submitted in English.

As the contract to be concluded is a contract for works, please offer a fixed lump sum price that covers all relevant costs (fees, travel expenses etc.). The price bid will be evaluated on the basis of the specified lump sum price. In addition, please also provide the underlying daily rate. A breakdown of days is not required.