

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



SOLAR PHOTOVOLTAIC GREEN CARD FINAL ASSESSMENT AND EXAMINATION FOR 126 TECHNICAL VOCATIONAL EDUCATION AND TRAINING ELECTRIANS AND LECTURERS	Project number/ cost centre: 20.2107.9-001.00
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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
FK	Expert
FKT	Expert days
KZFK	Short-term expert
TVET	Technical Vocational Education and Training
CoC	Certificate of Compliance
CPD4E	Career Path Development for Employment
DHET	Department of Higher Education and Training
FK	Expert
FKT	Expert days
KZFK	Short-term expert
TVET	Technical Vocational Education Training
ToRs	Terms of reference
PV	Photovoltaic
SAPVIA	South African Photovoltaic Industry Association

1. Context

Project Description

The Career Path Development for Employment (CPD4E) project is implemented by Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) funded by the **German Federal Ministry for Economic Cooperation and Development (BMZ)** and **co-financed by the Swiss State Secretariat for Economic Affairs (SECO)**. The project is implemented in collaboration with the Department of Higher Education and Training (DHET) and various other public, non-governmental and private sector stakeholders.

The objective of the GIZ/CPD4E project is to improve the employment prospects of young South Africans in low-carbon footprint economic sectors by:

- Strengthening capabilities of employment promotion institutions
- Improvement of support interventions for MSMEs
- Strengthening capacities of training providers
- Improved employment prospects of young people in a sustainable, increasingly decarbonized economy

Problem analysis

As part of efforts to strengthen the capabilities of employment promotion institutions in the design and implementation of new innovative approaches, CPD4E ¹seeks to pilot different types of employment promotion and income generation interventions such as demand-driven short skills programmes and business development services.

Today, in South Africa, renewable energy is becoming an alternative to coal power, and is supplementing the traditional coal powered energy supply. Clean Energy, such as Solar power includes photovoltaics (PV) and concentrated solar power (CSP). As of 2023, South Africa had over 2700 MW of installed PV solar capacity in its grid, and an additional 500 MW of CSP. Installed capacity is expected to reach 8400 MW by 2030.

Most areas in South Africa average more than 2500 hours of sunshine per year, average solar-radiation levels range between 4.5 and 6.5 kWh/m² in one day.

The southern African region has sunshine all year round. The use of solar energy is the most readily accessible resource in South Africa. It lends itself to several potential uses and the country's solar-equipment industry is developing. Annual photovoltaic (PV) panel-assembly capacity totals 5MW, and a number of companies in South Africa manufacture solar water-heaters.

The requirement for qualified and certified solar installers to participate in construction projects is South Africa, in order to ensure quality standards and compliant installations. All new solar systems require the supervision and general control of an Installation Electrician or

¹ Funded by the German Federal Ministry for Economic Cooperation and Development (BMZ) and co-financed by the Swiss State Secretariat for Economic Affairs (SECO)

Master Electrician. GIZ has initiated a training programme for 126 participants on the Certificate of Compliance as well as Solar installation in 6 participating TVET colleges. Each college enrolling 20 students and one participating lecturer. The table below indicates the participating colleges:

No.	Trade	TVET college	Province
1.	Electrician	Ekurhuleni East	Gauteng
2.	Electrician	Erkurheni West	Gauteng
3.	Electrician	Flavius Mareka	Free State
4.	Electrician	Northlink	Western Cape
5.	Electrician	East Cape Midlands	KZN
6.	Electrician	Sekhukhune	Limpopo

2. Tasks to be performed by the contractor.

The contractor is responsible for providing the following services:

- 2.1) Assessment of 126 participants against the Solar PV.
 - Final theory examination
 - Final practical examination
- 2.2) Certification of successful candidates and compilation of reports
- 2.3) The contractor will do final practical examination on the college premises and final theoretical examination on the accredited assessment centres accredited by SAPVIA. The contractor must have centres located in the vicinity or near the participating colleges, so as to avoid the transportation of students or at least reduce this to a minimum. Contractors must have assessment centres in the provinces where the participating colleges are located.. Contractors with only one centre nationally are will not be considered for the purpose of this tender, unless it is possible to conduct the assessments on the college site.

It must be noted that students would have been trained and that only the assessments will be required not the full training programme.

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
Signing contract	1.10.2024
Issue of the implementation plan	One day after signing the contract
Completion of final theoretical examination on 126 participants	Within– four weeks of signing the contract as agreed with by the training provider.
Completion of final practical examination on 126 participants	Within– four weeks of signing the contract as agreed with by the training provider.
Certification and issuing of certification report	After completion of both theoretical and practical final examinations for 126 participants No more than 6 months after the signing of the contract.

Close report	Within four days after certification of 126 participants
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Period of assignment: from 08 until 30.02.2025.

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).

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 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.

Further requirements (1.7)

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 7), 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.

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 2, 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

- Conduct final examinations for both theoretical and practical on PV Green card for 126 participants.
- Produce certification reports.
- Issue certification report for 126 participants.
- Provide progress reports upon request.
- Keep timesheets for other experts and submit to GIZ.
- Ensuring effective management of the data, information and lessons generated from the project activities.
- Facilitating meaningful dissemination of the data, information and lessons generated from the project activities in line with GIZ requirements.
- Complete and issue close out report.
- Keep record of timesheets.

Qualifications of the short-term expert pool

- Education/training (2.6.1): 2 experts with university qualification OR accredited qualifications by SAPVIA (South African PV Industry Association) to conduct assessment and final examination pertaining PV GreenCard.
- Language (2.6.2): 2 experts with C2-level language proficiency English in Language
- General professional experience (2.6.3): 2 experts with 1 years of professional experience in the Solar PV Installations sector.
- Specific professional experience (2.6.4): 2 experts with 1 years of professional experience in Solar PV GreenCard assessment, examinations and Training.
- Regional experience (2.6.5): 2 experts with 0 years of experience in Southern African (region), 2 experts with 1 years of experience in South Africa (country)

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

5. Costing requirements

Assignment of personnel and travel expenses

Per-diem and overnight accommodation allowances are reimbursed as a lump sum up to the maximum amounts permissible under tax law for each country as set out in the country table in the circular from the German Federal Ministry of Finance on travel expense remuneration (downloadable at <https://www.bundesfinanzministerium.de>).

Accommodation costs which exceed this up to a reasonable amount and the cost of flights and other main forms of transport can be reimbursed against evidence.

All business travel must be agreed in advance by the officer responsible for the project.

Sustainability aspects for travel

GIZ would like to reduce greenhouse gas emissions (CO₂ emissions) caused by travel. When preparing your tender, please incorporate options for reducing emissions, such as selecting the lowest emission booking class (economy) and using means of transport, airlines and flight routes with a higher CO₂ efficiency. For short distances, travel by train (second class) or e-mobility should be the preferred option.

If they cannot be avoided, CO₂ emissions caused by air travel should be offset. GIZ specifies a budget for this, through which the carbon offsets can be settled against evidence.

There are many different providers in the market for emissions certificates, and they have different climate impact ambitions. The [Development and Climate Alliance \(German only\)](#) has published a [list of standards \(German only\)](#). GIZ recommends using the standards specified there.

Specification of inputs

Fee days	Number of experts	Number of days per expert		Comments
Designation of TL/key expert/short-term expert pool	2	6	12	
Travel expenses	Quantity	Number per expert	Total	Comments
Per-diem allowance in country of assignment	6	2	R400	Against evidence
Overnight allowance in country of assignment	6	2	R1400	Against evidence
Transport	Quantity	Number per expert	Total	Comments

Other costs	Number	Price	Total	Comments
Solar PV Greencard Final examinations	126	R5104.762	R643 200	The budget contains solely costs for Solar PV Green Card final theoretical and Practical examinations for 126 participants
Fixed Motor vehicle operating costs	2	R12 301.79	R24 603.58	Against evidence (Mileage and Logbook)

6. Inputs of GIZ or other actors

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

- DHET will introduce the contractor and initiatives to the TVET colleges and ensure participation, compliance, commitment and completion.
- GIZ: Information about the project and existing monitoring concepts and practices
- GIZ: Meeting logistics, regular consultations and clarification of questions as needed.
- GIZ: Provide support for the comprehensive monitoring and evaluation.
- DHET/ colleges: Provide connectivity (internet access) for all TVET trainers either through mobile data (Where possible) or internet access at the TVET colleges or through other partnerships.
- DHET/colleges to procure transportation for the participants to attend the assessment centres for the final theoretical examination.

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 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 complete tender must not exceed 10 pages (excluding CVs). If one of the maximum page lengths is exceeded, the content appearing after the cut-off point will not be included in the assessment. External content (e.g. links to websites) will also not be considered.

The CVs of the personnel proposed in accordance with Chapter 4 of the ToRs must be submitted using the format specified in the terms and conditions for application. The CVs shall not exceed 4 pages each. They must clearly show the position and job the proposed person held in the reference project and for how long. The CVs can also be submitted in English (language).

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

8. Outsourced processing of personal data

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.

GIZ does not have access to personal data for the participants under lot 1,2 and 3 hence the contractor must access this information from the TVET colleges. The participating TVET colleges will share their enrolment data with the contractor. The contractor will handle the participant's personal data according to their organisational rules and as per POPIA. It is advised that a contractual agreement on data protection is concluded between the contractor and the TVET colleges.

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 regional and local laws.

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 GIZ is NOT in any way responsible for such processing. In order to comply with data protection regulations, only aggregated and/or anonymized data will be submitted to GIZ by the contractor. that the consent of the data subjects has been obtained.

9. Other Requirements

- Please submit your proposal (technical and price proposal) in separate files/folder to ZA_Quotation@giz.de no later than **16th July 2024** 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

