

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

Terms of Reference for DHET- Occupational Trade Conveners	Project number/ cost centre:
Supporting Trades under Cluster 2	20.2017.9-001.00
(Fitter and Turner, Mechanical Fitter, Pipe Fitter, Electrician and Millwright Trades)	

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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.
CoS	Centre of Specialisation
CPD4E	Career Path Development for Employment
DHET	Department of Higher Education and Training
DoL	Department of Labour
EWSETA	Energy & Water Sector Education Training Authority
FK	Expert
FKT	Expert days
OTC	Occupational Trade Conveners
SAQA	South African Qualification Authority
SANS	South African National Standards
SETA	Sector Education Training Authority
TVET	Technical Vocational Education Training
ToRs	Terms of reference

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)** 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

As part of efforts to strengthen the capabilities of employment promotion institutions in the design and implementation of new innovative approaches, CPD4E¹ seeks to pilot different types of employment promotion and income generation interventions such as demand-driven short skills programmes and business development services.

Problem analysis

The government, through the Department of Higher Education and Training (DHET), has designed and implemented the Centres of Specialisation Programme in the TVET college sector (the CoS Programme). The CoS Programme entails the establishment of a dedicated department – known as a Centre of Specialisation (CoS) - within a host TVET college which serves as an anchor, working closely with employers, to deliver a dual-system based apprenticeship programme.

In 2019, the DHET rolled out the CoS Programme in 19 public TVET colleges. Thirteen priority artisan trades were selected, with each trade offered at two sites.

The project geared towards the transformation of the TVET sector, such as, addressing challenges of youth unemployment in South Africa. The underlying principle behind the intervention was to implement dual system apprenticeship, which is aligned to business needs to support young people to progress from training to employment. The fundamental objective of the programme was to produce a skilled and capable workforce, which supports inclusive economic growth, and increased availability of critical technical and artisanal skills. GIZ played

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)

a significant role in the development and implementation of the apprentice dual system, through the SD4GEII support programme.

Centre of Specialisation Outcomes

The following outcomes were planned with the original implementation of the CoS:

- The Long-Term Outcome is to increase the number of intermediate skills required for economic growth.
- The Intermediate outcome is to increase delivery of skills in 13 identified trade areas. This will be achieved through the number of artisans produced in the 13 identified trade areas from the Centres of Specialisation.
- The Immediate Outcome is to increase the capacity of TVET colleges to produce intermediate skills in 13 identified trade areas. This outcome is achieved through a few TVET colleges using improved curricula and training facilities, adequate industry partnership to support teaching/ learning and number of TVET colleges that have lecturers that are qualified to provide teaching for the identified 13 trades.

DHET approved 13 trades and were delivered through a dual system for each CoS. The following are the priority trades with OFO codes delivered by the respective CoS:

- 653101 *Automotive Motor Mechanic*
- 651302 *Boilermaker*
- 641201 *Bricklayer*
- 641501 *Carpenter and Joiner*
- 653306 *Diesel Mechanic*
- 671101 *Electrician*
- 652302 *Fitter and Turner*
- 653303 *Mechanical Fitter*
- 671202 *Millwright*
- 642607 *Pipe Fitter*
- 642601 *Plumber*
- 651501 *Rigger*
- 651202 *Welding*

Occupational team convenors (OTC) were appointed per college per trade to support the implementation of the CoS specifically with the view of strengthening the relationship between TVET colleges and industry / employers. The OTCs contracts lapsed in 2022 leaving the colleges in a position to manage industry relationships on their own. Some colleges were ready to take on this responsibility while others are not.

2. Tasks to be performed by the contractor.

It is the aim of this tender to find a contractor to fulfil the role of OTC, in as far as supporting colleges to manage their future relationships with employers but also to support graduates into the labour market. The initiative will support 336 learners from various Centre of Specialisations for 10 months under this tender clustered on the below table:

TRADE	TVET COLLEGE	CAMPUS	LOCATION	LEARNERS TO BE SUPPORTED
Fitter and Turner	North Link	Wingsfield	Wakefield	42

Mechanical Fitter	False Bay	Westlake	Muizenberg	31
Pipe Fitter	West Coast	Vredendal	Saldanha Bay	104
Fitter and Turner	Tshwane South	Centurion	Centurion	5
Mechanical Fitter	Tshwane South	Pretoria West	Pretoria	69
Electrician	Tshwane South	Pretoria West	Pretoria	55
Millwright	Tshwane South	Pretoria West	Pretoria	30
TOTAL				336

The contractor will be responsible for providing the following services:

- 1) Capacitation of the 4 TVET colleges to perform the OTCSs role for CoS programme in the future, for cluster 2.
 - a) Enhance and strengthen relationships between employers/Industry and TVET colleges.
 - b) Mentorship and transferring of skills to the college staff/facilitators or project managers so that they can continue without the OTCs in future.

- 2) Improving the prospects of employability of the CoS learners and Graduates.
 - 2.1 Develop an employment strategy for the graduates completing in 2023 out of (336 students). This can include but it not limited to the following suggestions:
 - a) Soft skills development including such as curriculum vitae preparations, interview techniques, work ethics (appearance, attendance, attitude, character, communication, corporation, organisation skills, productivity, respect, Career guidance, and teamwork) or any other interventions seen as appropriate.
 - b) Provide entrepreneurial training for self-employment qualified CoS graduates.
 - c) Liaise with relevant industry associations to identify suitable work placement opportunities for the cohort and match the graduates with employers based on the need of the employment markets.
 - d) Secure employment for 70% graduates with an emphasis on supporting woman. The contractor will be incentive for successful placement of the learners.
 - 2.2 Implementation of the employment strategy put forward in 2.1.
 - (a) Audit the number of students who will graduate in 2023 and 2024 and provided names and details of the students.
 - (b) Placement of a minimum of 70% of graduates that are expected to complete the training.

In the kick-off meeting after the start of the contract, the contractor will be briefed by GIZ about the project and reporting procedures. The contractor will engage with the respective CoS and map forward support steps to be followed in delivery of the contract.

The GIZ will play a central role in the management of this contract, of which terms related to their performance will be agreed to by both parties. On an ongoing basis progress meetings will take place to assess achievements and challenges, and the proposed solutions.

And the contractor will be expected to submit and present a report, GIZ and DHET/SPU will provide feedback, and might require adjustments to the report if critical information is missing. At the end of the project, the final report will be shared with relevant stakeholders, and personal data of relevant participants into the project as part of the process with the contractor and GIZ will be treated strictly confidential and in compliance with South African and German data protection laws.

Any communication with the colleges and or employers will be done in line with the association's rules and requirements and the GIZ indemnifies itself from any potential misunderstandings. The DHET as the overall custodian of the programme will continue to support the OTC's as it was done in the past.

As shown in the following table, specific milestones are to be reached at specific points during the contract term. Milestones can be subject to change.

Milestone	Deadline
Approved Inception Report	11/2023
Contractor Contract and Signed SLA	11/2023
Detailed Project Implementation Plan	11/2023
Employment Strategy plan for 2023 completing Cohorts (Confirm student names and numbers and expected completion date)	1/2024
Interventions to start	1/2024
Quarterly Progress Monitoring Reports with reporting on placement targets	03/2024-9/2024
Draft Close Out Report	9/2024
Close Out Report	12/2024

Period of assignment: From 01.11. 2023 until 31 .12. 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 (Not Applicable)**.

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.

- The contractor is responsible for selecting, preparing, training and steering the 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.

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 0), 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.

For this tender, at least 2 experts will be required to support the clustered centres as follows:

TRADE	TVET COLLEGE	CAMPUS	LOCATION	EXPERTS
Fitter and Turner	North Link	Wingsfield	Wakefield	1
Mechanical Fitter	False Bay	Westlake	Muizenberg	
Pipe Fitter	West Coast	Vredendal	Saldanha Bay	
Fitter and Turner	Tshwane South	Centurion	Centurion	1
Mechanical Fitter	Tshwane South	Pretoria West	Pretoria	
Electrician	Tshwane South	Pretoria West	Pretoria	
Millwright	Tshwane South	Pretoria West	Pretoria	
TOTAL				2

The bidder must adhere to the following conditions related to the use of experts to support the TVET colleges:

- 1) Experts to support Northlink, False Bay and West Coast TVET colleges should be based in Western Cape or Cape Town.
- 2) Experts to support Ekurhuleni East and Tshwane South should be based in Gauteng Province.

Key experts (1-2)

Tasks of the key expert 1-2

- Overall responsibility for the advisory packages of the contractor (quality control, steering and coordination of assignment with responsible CPD4E technical advisor and if relevant with head of component and AV, deadlines)
- Coordinating and ensuring communication with GIZ, partners and others involved in the project.
- Supporting the College to work with industry.
- Supporting students to find employment opportunities.
- Experts who reside in the province or close to the CoS will be an advantage - reducing the travel expenses.
- Regular reporting in accordance with deadlines
- Ensuring results monitoring is conducted.
- Oversee project implementation.
- Responsibility for controlling the use of funds and financial planning in consultation with GIZ's officer responsible for the commission.

- Supporting the officer responsible for the commission in updating/adapting the project strategy, in evaluations and in preparing a follow-on phase
- Ad-hoc tasks where necessary.
- Support and capacitate to the strengthening of the competence of facilitators and lectures to engage with the employers regarding employment opportunities for the CoS learners and graduates.
- Provisioning of professional advice and expertise
- Capacitation and training of TVET college lecturers and project managers
- Skills transfer to the TVET college lecturers and project managers
- Engagement with the industry.
- Support the monitoring and evaluation of the project.
- Provide technical and advice.
- Provide progress reports upon request.

Qualifications of the Key experts 1-2

- Education/training **(2.2.1) (2.3.1)**: university degree (German ‘Diplom’/Master) in Engineering or Trade Diploma (Artisan Qualification) or Equivalent.
- Language **(2.2.2) (2.3.2)**: A1-level language proficiency in English Language and excellent communication skills both verbal and written in English and possibly a national language.
- General professional experience **(2.2.3) (2.3.3)**: 10 years’ experience in the education sector (companies, industry associations, higher and vocational education institutions) in the field of skills development and in particular Artisan Development.
- Specific professional experience **(2.2.4) (2.3.4)** : 10 years of experience in the TVET and SETA sector particularly understanding its links to the Trade and Industry sector, company knowledge especially those involved in the trades listed under cluster. Work experience at the interface between private sector demand, labour markets and employment promotion. Familiar with GIZ human capacity development processes strengthening individual capacities and supporting organisational change. Understanding of the current approaches/initiatives/events promoting employment and job creation in South Africa.
- Leadership/management experience **(2.2.5) (2.3.5)**: 10 years of management/leadership experience: in a company or higher education institution as the Project team leader or manager. Understanding of the current system of trade testing in South Africa and the related institutions and organisations involved. Familiarity and or experience with the dual occupational programme is an additional advantage in South Africa. Able to Liase with relevant industry associations to identify suitable work placement opportunities, including matching graduates with employment opportunities.

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

4. 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	Total	Comments
Designation of TL/key expert/short-term expert pool	2	175	350	Additional travel costs not provided for.
Travel expenses	Quantity	Price	Total	Comments
Per-diem allowance in country of assignment	50	R400	R20 000	
Overnight allowance in country of assignment	50	R1 500	R75 000	
Transport	Quantity	Price	Total	Comments

International flights				Additional travel costs not provided for.
Domestic flights				Additional travel costs not provided for.
CO₂ compensation for air travel				Additional travel costs not provided for.
Travel expenses (train, car) • Car	50	R100	R5 000	Travel within the country of assignment, transfer to/from airport etc.
Other costs	Number	Price	Total	Comments
Flexible remuneration	1	R200 000	R200 000	A budget of EUR 10 000 is foreseen for flexible remuneration. Please incorporate this budget into the price schedule. Use of the flexible remuneration item requires prior written approval from GIZ.

Flexible Remuneration

Flexible Remuneration budget: ZAR 200,000

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.

The following payment plan will be used for the duration of the contract:

Payment	Percentage	Deliverable
01 (Advance Payment)	25%	Signed Contract, Inception report, Detailed Project Plan
02	30%	3rd Month progress report
03	25%	6th Month progress report
04 (Final Payment)	20% (Remainder)	Close-out Report

5. 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.

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 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.

7. 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.

5. Other Requirements

- Please submit your proposal (technical and price proposal) in separate files/folder to ZA_Quotation@giz.de no later than **20th October 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.**