

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

TERMS OF REFERENCE FOR CERTIFICATE OF COMPLIANCE TRAINING FOR TVET COLLEGE LECTURERS AND LEARNERS	Project number/ cost centre: 20.2017.9-001.00
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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.
CoC	Certificate of Compliance
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
GTCC	General Terms and Conditions (GTCC) for supplying services and work 2022
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

In South Africa, once an electrical artisan is qualified a further license is required to practice and issue a certificate of compliance. Often the electrician does not have access to this training or simply is unable to pass the exam. This has led to a significant shortage of licenced electricians in a formal sector. This has resulted in many electricians needing to work under the supervision of a licensed electrician or working in the informal sector, where clients do not insist on the certification. This has a significant impact on their ability to work professionally and has numerous risks associated for the consumer and the electrician alike.

Currently the pass rate for licensing examinations are very low. A fee is payable for the exam and due to the high failure rate electricians are discouraged from attempting the examination. One of the major contributing reasons for the failure rate is the electricians lack of practical and contextual exposure.

Traditionally students are not extensively supported to gain insight into various practical scenarios which will support the student's ability to pass the exam successfully but also to become a good artisan in a range of contexts.

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)

This initiative aims to respond to the challenges the country is facing with regards to lack of registered installations Electricians. The benefit of the programme will be to maximise employment and self-employment opportunities for electricians. There are three categories of registered people who are permitted to issue a Certificate of Compliance (CoC).

1. **Electrical Tester for Single Phase:** Single phase registered electrician in terms of regulation 11 (2) for the verification and certification of the construction, testing and inspection of electrical installations supplied by a single-phase electricity supply at the point of control.
2. **Installation Electrician:** electrician registered as installation electrician in terms of regulation 11 (2) for the verification and certification of the construction, testing and inspection of any electrical installation.
3. **Master Installation Electrician:** This is an electrician who has been registered as a master installation electrician in terms of regulation 11 (2) for the verification and certification of the construction, testing and inspection of any electrical installation.

The aim of this initiative is to support cohorts of unemployed qualified electrician from Centre of Specialisation (CoS) and Dual System Apprenticeship Programmes (DSPP) programmes and lecturers at various TVET colleges. **The trade to be supported under category 2 (Installation Electrician: electrician registered as installation electrician in terms of regulation 11 (2) for the verification and certification of the construction, testing and inspection of any electrical installation) is *electrician*.**

2. Tasks to be performed by the contractor.

The contractor is responsible for providing the following services:

- 1) Training of 6 lectures/facilitators and 120 artisans (electricians) to acquire DoL CoC.
 - Preparatory training for installation rules exam (paper 1 and 2)
 - Training (assessment and moderation included) on 2 EWSETA unit standards (test and inspect a three-phase industrial/commercial installation & practical training (Condition assessment on electrical installation compliance of a TVET college building).
 - Portfolio of Evidence compilation through the assessment of the college infrastructure.
 - 70% of students must show an improved employment status at the end of the training period.
- 2) Support the 6 TVET colleges to extent scope of their accreditation to EWSETA, so that in future they can offer the following 2-unit standards for category 2 (installation electrician).
 - SAQA ID unit standard title (259197):test and inspect a three-phase industrial/commercial installation.
 - SAQA ID unit standard title (13683): Issue certificate of compliance for a domestic/commercial/industrial installation.

The provider delivering the unit standards must be accredited and assessor and moderators must be registered with EWSETA to deliver and assess the two-unit standards (259197) & (13683).

- 3) Document case studies across the 6 TVET colleges which will provide students with various learning contexts.

- Through the use of technology create a range of case studies of real-life situations where students can become familiar with application of the installation rules (SANS codes) in real life situations.
- Digitisation of theory for wireman`s licence in order to create modern and effective learning experience that prepares participants with the skills and knowledge to excel in the electrical industry. The digitalisation of training materials installation electricians will require the following:
 - a. Engage with subject experts and industry professionals to gather the latest information and best practices to include in the training materials.
 - b. Detail plan for digitising the training materials, including the use of technology platforms, multimedia tools, and interactive content to enhance learning outcomes.
 - c. Collaborate with technology partners and experts to develop a customised digital platform for the delivery of the training materials, taking into account the needs and preferences of the target audience.
 - d. Development of a comprehensive training plan for instructions and facilitators to ensure that we equip them with the skills and knowledge to deliver the digital training material effectively.

4) Training of 6 lecturers and 120 electricians on PV installations through PV green card training.

The table below is the 6 participating TVET colleges:
(This contract may be extended to a further 6 colleges pending the successful completion).

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

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
Inception Report	10/2023
Contractor Contract and Signed SLA	10/2023
Detailed Project Implementation Plan	12/2023
Interventions to start	1/2024
Quarterly Progress Monitoring Reports	03/2024-9/2024
Report on accreditation of TVET colleges	9/2024
Draft Close Out Report	9/2024
Close Out Report	12/2024

Period of assignment: from 01.10. 2023 until 31 .12. 2024.

3. Concept

In the tender, the tenderer is required to show *how* the objectives defined in Chapter 0 (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 0 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 0 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 0 (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)

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.

Team leader

Tasks of the team leader

- 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.
- 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

Qualifications of the team leader

- Education/training (2.1.1): university degree (German 'Diplom'/Master) in Skills Development, Education, Management, Development Studies, Economics, International Relations, ICT Project Management or Equivalent
- Language (2.1.2): A1-level language proficiency in English Language
- General professional experience (2.1.3): 10 years of professional experience in the in working with the education sector (companies, industry associations, higher and vocational education institutions) in the field of skills development sector.
- Specific professional experience (2.1.4): 10 years in higher education sector and in consulting programmes in the TVET or skills development sector in South Africa in a management position
- Leadership/management experience (2.1.5): 10 years of management/leadership experience as project team leader or manager in a company

Key expert 1

Tasks of key expert 1

- Digitally document all case studies across 6 TVET colleges.
- Formulate digital case studies into learning material.
- Package learning material and scenarios for future use.
- Establish a data base of digital case studies for students to access in the future.
- Provisioning of professional advice and implementation regarding digital case studies.

Qualifications of key expert 1

- Education/training (2.2.1): Digital technology or Skills Development, TVET, E-learning, Media Development, Train-the-Trainer, Education Management
- Language (2.2.2): A2 -level language proficiency in excellent communication skills both verbal and written in English and possibly a national language
- General professional experience (2.2.3): 10 years of professional experience in working with the education sector (companies, industry associations, higher education institutions) in the field of skills development
- Specific professional experience (2.2.4): 10 years higher education sector, in consulting programmes in the TVET/skills development sector in South Africa in a management position and in the design, development, and implementation of Digital Skills Enhancement (especially at Train-the-Trainer level) Programmes and interactive e-learning Programmes, digital technology and or development of digital learning materials.
- Leadership/management experience (2.2.5): 5 years of management/leadership experience as project team leader or manager in a company or higher education institution

Key expert 2

Tasks of expert 2

- Support students to develop a Portfolio on compliance matters at each of the various colleges.
- Support with the training of CoC and PV installation.
- Assist team lead with work packages
- Organise training and onboarding of the participants.
- Conduct and facilitate training for lecturers and young artisans regarding CoC.
- Support the monitoring and evaluation of the project.
- Support the assessment and moderation of the 126 participants (covering lectures and young artisans)
- Ensure transfer of skills is conducted using practical role plays that support the theory
- Ensure participation by ALL participants and ensure that they can transfer skills acquired to their respective working environments

Qualifications of key expert 2

- Education/training (2.3.1): Degree in Skills Development, Train-the-Trainer, Education Management, Development Studies, Economics, International Relations or Equivalent, engineering or artisan qualification
- Language (2.3.2): A2 -level language proficiency in excellent communication skills both verbal and written in English and possibly a national language
- General professional experience (2.3.3): 10 years of professional experience in working with the education sector (companies, industry associations, higher education institutions) in the field of skills development
- Specific professional experience (2.3.4): 10 years higher education sector, in consulting programmes in the TVET/skills development sector in South Africa in a management position and in the design, experience as an electrician or electrical engineering for the PV installation and or/ CoC training
- Leadership/management experience (2.3.5): 5 years of management/leadership experience as project team leader or manager in a company or higher education institution

Key expert 3

Tasks of expert 3

- Support students to develop a Portfolio on compliance matters at each of the various colleges.
- Support with the training of CoC and PV installation.
- Assist team lead with work packages
- Organise training and onboarding of the participants.
- Conduct and facilitate training for lecturers and young artisans regarding CoC.
- Support the monitoring and evaluation of the project.
- Support the assessment and moderation of the 126 participants (covering lectures and young artisans)
- Ensure transfer of skills is conducted using practical role plays that support the theory
- Ensure participation by ALL participants and ensure that they can transfer skills acquired to their respective working environments

Qualifications of key expert 3

- Education/training (2.4.1): Degree in Skills Development, Train-the-Trainer, Education Management, Development Studies, Economics, International Relations or Equivalent, engineering or artisan qualification
- Language (2.4.2): A2 -level language proficiency in excellent communication skills both verbal and written in English and possibly a national language
- General professional experience (2.4.3): 10 years of professional experience in working with the education sector (companies, industry associations, higher education institutions) in the field of skills development
- Specific professional experience (2.4.4): 10 years higher education sector, in consulting programmes in the TVET/skills development sector in South Africa in a management position and in the design, experience as an electrician or electrical engineering for the PV installation and or/ CoC training
- Leadership/management experience (2.4.5): 5 years of management/leadership experience as project team leader or manager in a company or higher education institution

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
Team Leader	1	24	24	Coordination and reporting per college
Key Expert 1	1	60	60	Digital learning material expert
Key Expert 2	1	132	132	Support students to develop portfolio of evidence.
Key Expert 3	1	132	132	Support students to develop portfolio of evidence.
Travel expenses	Quantity	Price	Total	Comments
Per-diem allowance in country of assignment	50			

Overnight allowance in country of assignment	50			
Transport	Quantity	Price	Total	Comments
Domestic flights	5			Flights within the country of assignment during service delivery
CO ₂ compensation for air travel	5			A budget is earmarked for settling carbon offsets against evidence.
Travel expenses (train, car) • Car	50			Travel within the country of assignment, transfer to/from airport etc.
Other costs	Number	Price	Total	Comments
Workshops	126	R3 000	R378 000	The budget contains the following costs item for PoE compilation (Completion of the 2-unit standards - SAQA ID (259197 & 13683)
Subcontracts	126	R 8 000	R1 008 000	The budget contains the following costs item for Training on Solar PV green card (preparatory, assessment and exam)
Procurement of materials and equipment	120			The budget contains the following costs item for Procurement of Basic Tools for Electricians.
Other costs	1	R481,330	R481,330	The budget contains the following costs items: <ul style="list-style-type: none"> • Examination fees (Paper 1 & 2 for installation rules) • Extension of accreditation scope for TVET colleges • Catering for training participants for 6 colleges

Workshops and training

126 participants from 6 TVET collages will be trained in PoE compilation (Completion of the 2-unit standards - SAQA ID (259197 & 13683) and on Solar PV green card (preparatory,

assessment and exam). The Participating TVET colleges will make available venue or classrooms for the training to take place at no costs. However, the tenderer should also organise for the catering for the participants. Training budget for 6 TVET colleges for 126 participants: ZAR 378 000 + ZAR 1 008 000

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 schools or through other partnerships.
- DHET/colleges: Identify the learners and lectures to participate in the project.
- TVET colleges to vail venue or classrooms for training purposes.

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 0 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.

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

8. Other Requirements

- Please submit your proposal (technical and price proposal) in separate files/folder to ZA_Quotation@giz.de no later than **08th 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.**