

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



MODERATION AND FACILITATION SERVICE FOR DS4JI	Project number/ cost centre: 22.2042.4-001.00
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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
ToRs	Terms of reference

1. Context

Leveraging the learnings from its predecessor, Digital Skills for Jobs and Income, the Digital Skills for Jobs and Income II (DS4JI II) project was commissioned by the German Federal Ministry for Economic Cooperation and Development (BMZ) in the period of 01. April 2024 to 31. March 2027. Its objective is to enhance employment opportunities for young individuals in the rapidly evolving South African digital economy.

This iteration is to refine the integration of support services, delivering seamless navigation for youth transitioning from Technical and Vocational Education and Training (TVET) and youth not in education, employment or training (NEET) into the digital labour market.

a. Output 1: Professional Orientation and Guidance

Provide vocational students at selected TVET Colleges with career planning support and information on digital career pathways.

b. Output 2: Demand-oriented Further Training Measures

Offer targeted training measures that meet the digital economy's demands and support job readiness.

c. Output 3: Transition to Employment or Self-employment

Assist young people in navigating the move from training to working environments or starting digital businesses.

d. Output 4: Development of Evidence-based Digital Career Pathways

Establish clear, demand-oriented career paths in the digital sector, leveraging labour market analyses.

The DS4JI II project is implemented with the South African Department of Communications and Digital Technologies (DCDT) and guided by the National Digital and Future Skills Strategy and Implementation Plan.

The service provider is tasked with facilitating at least 25 sessions over the project duration to enhance digital skills and foster job and income opportunities. These sessions will involve both internal stakeholders and external partners. Key responsibilities include preparing and delivering interactive and educational content, utilizing digital tools to manage hybrid sessions effectively, and working with a scribe where necessary to ensure comprehensive documentation of proceedings. The provider will also analyze session feedback to refine future workshops, ensuring alignment with the project's objectives and adaptive response to participant needs.

2. Tasks to be performed by the contractor

The contractor is responsible for providing the following services:

- Facilitating at least 25 sessions over the project duration, engaging with internal teams and external partners.
- Utilizing a scribe for detailed documentation in sessions where necessary, ensuring key points and follow-up actions are captured.

- Prepare and manage digital tools for hybrid sessions to ensure seamless participation for both in-person and remote participants.
- Prepare and manage fully virtual sessions as required
- Report on session outcomes and provide synthesized content for dissemination and follow-up.

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

Milestones/Process Steps/Partial Services	Deadline
Milestone 1: Project Kick-off and Planning	Deadline: August 2024
Milestone 2: Development of Facilitation Framework	Deadline: August 2024
Milestone 3: First Facilitation Session	Deadline: September 2024
Milestone 4: End of Year One Review	Deadline: June 2025
Milestone 5: Mid-Project Evaluation	Deadline: July 2025
Milestone 6: End of Year Two Review	Deadline: June 2026
Milestone 7: Implementation of Revised Strategies	Deadline: July 2026
Milestone 8: Final Facilitation Sessions	Deadline: February 2027
Milestone 9: Final Evaluation and Reporting	Deadline: March 2027
Milestone 10: Project Closure and Handover	Deadline: March 2027

Period of assignment: from 01 August 2024 until 31 March 2027.

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**.

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.

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 (German 'Diplom'/Master) in a relevant field such as education, business administration, social sciences, or a related area that aligns with the project's focus on digital skills and economic development.
- Language (2.1.2): C1-level language proficiency in English.
- General professional experience (2.1.3): ten years of professional experience in education, training, workforce development, or related sectors.
- Specific professional experience (2.1.4): five years in project-oriented facilitation, including setting up and managing hybrid sessions using digital tools
- Leadership/management experience (2.1.5): five years of management/leadership experience as project team leader or manager in a company

- Regional experience (2.1.6): five years of experience in projects in Southern Africa, of which 2 years in projects in South Africa.
- Development cooperation (DC) experience (2.1.7): two years of experience in DC projects

Key expert 1

Tasks of key expert 1

- Attend all key sessions facilitated by the Team Leader/Facilitator.
- Accurately document discussions, decisions, and action items during the sessions.
- Assist in the preparation of session reports, ensuring clarity and thoroughness to facilitate follow-ups.
- Manage and organize session outputs for easy access and reference in future project activities.
- Support the Team Leader/Facilitator in data management and reporting requirements.

Qualifications of Key Expert 1

- Education/training (2.2.1): Bachelor's degree in communications, Journalism, Business Administration, or a related field.
- Language (2.2.2): C1 -level language proficiency in English.
- General professional experience (2.2.3): three years of experience in professional documentation, including creating detailed meeting minutes and reports and effectively managing information flow within a project setting.
- Specific professional experience (2.2.4): three years' experience in drafting and organizing detailed documentation for educational or development projects, ensuring that all pertinent information is captured and made accessible for future reference.
- Leadership/management experience (2.2.5): three years of experience leading documentation efforts within team settings, effectively coordinating with multiple stakeholders to ensure comprehensive coverage of discussions and decisions.
- Regional experience (2.2.6): two years of experience in projects in Southern Africa, of which 2 years in projects in South Africa
- Development Cooperation (DC) experience (2.2.7): two years of experience in DC projects

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

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	Total	Comments
Designation of Team Leader	1	75		
Designation of Key Expert	1	75		
Travel expenses	Quantity	Price	Total	Comments
Per-diem allowance in the country of assignment	50			
Overnight allowance in the country of assignment	50			
Transport	Quantity	Price	Total	Comments
Domestic flights	50			50 return Flights- within the country of assignment during service delivery.
CO ₂ compensation for air travel	50	R705,08	R35 290	
Other costs	Number	Price	Total	Comments

Fixed motor vehicle operating costs	1	R200 000	R200 000	Costs associated with mileage @ R4.84 and car rental. Logbook to be produced and receipt as part of evidence during invoicing
Flexible remuneration.	1	R74,860	R74,860	A budget of ZAR R74,860 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.

6. Inputs of GIZ or other actors

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

- GIZ will oversee the project's strategic direction, ensuring alignment with broader economic and educational goals.
- GIZ will introduce the contractor to partners and ensure participation, compliance, commitment and completion.
- GIZ will provide information about the project and existing monitoring concepts and practices.
- GIZ will provide support for the comprehensive monitoring and evaluation.

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.

The complete tender must not exceed 15 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.

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.