

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

Monitoring and Evaluation Services for Career Path Development for Employment (CPD4E)	Project number/ cost centre: 20.2107.9-001.00
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0. List of abbreviations

BMZ	German Federal Ministry for Economic Cooperation and Development
CEFR	Common European Framework of Reference for Languages
CPD4E	Career Path Development for Employment
CV	Curriculum Vitae
DC	Development Cooperation
DHET	Department of Higher Education and Training
FDG	Focus Group Discussion
GDPR	General Data Protection Regulation
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit
MERL	Monitoring, Evaluation, Reflection and Learning
MSME	Micro, small and medium sized enterprise
POPIA	Protection of Personal Information Act
SECO	Swiss State Secretariat for Economic Affairs
ToRs	Terms of reference

1. Context

The Career Path Development for Employment (CPD4E) project is implemented by the 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 partnership with the Department of Higher Education and Training (DHET) and collaboration with various other public, non-governmental and private sector stakeholders.

The objective of the CPD4E project is to improve the employment prospects of young South Africans in a sustainable and increasingly decarbonised economy (Just Transition). The project addresses two core problems: sufficient employment prospects for young South Africans and improving long-term potential employability of young people in a largely decarbonised economy.

The project aims to improve employment prospects in the context of a just transition by:

- Strengthening capacity of public, private and civil society actors in South Africa to develop and implement employment promotion measures in a sustainable, increasingly decarbonised economy. The project further aims to support pilot projects to improve innovative funding approaches to unlock employment potential in a sustainable and increasingly decarbonised economy
- Support micro, small and medium sized enterprises (MSMEs) to strengthen their competitiveness and growth prospects leading to creation of new jobs and increased demand for personnel as well as support to entrepreneurs to improve their business and income generation
- Supporting training providers to develop and implement qualifications and measures that address requirements for Just Transition aligned to emerging needs of the labour market as well as increasing delivery capacity, e.g. through training of lecturers and in-company mentors
- Providing support measures to improve employability of young people to transition to a sustainable decarbonised economy with a special focus on young women

CPD4E basic impact hypothesis states that strengthened capacities of employment promotion institutions (Output 1), an improvement in the support for MSMEs (Output 2), a strengthening of the capacities of training providers (Output 3) and the expansion of the support offer for the transition to employment (Output 4) together improve the employment prospects of young people. The results matrix is available in Annex 1.

Objectives of the assignment

The purpose of this assignment is to provide evidence of the results of the CPD4E project on the target beneficiaries. This evidence is essential for demonstrating the effectiveness and relevance of projects to political partners and the commissioning parties BMZ and SECO. Furthermore, the monitoring results provide a basis for learning and understanding what works

and what doesn't, enabling the project team to adapt strategies and approaches as needed. The assignment seeks to establish how the participants' lives have changed as a result of the intervention i.e. has the participants' employment situation improved based on the following criteria:

- Starting a new job in an employed capacity
- Starting self-employment
- Improvement in income or working conditions in an existing employment relationship

2. Tasks to be performed by the contractor

The assignment has five specific tasks, namely:

- (1) To conduct a survey on the following: module objective indicators one, two and three listed under 2.1 below.
- (2) To oversee the collection and analysis of data for reflection and learning of participants in work placement programmes listed in 2.2. below.
- (3) Conduct KOMPASS which includes qualitative data collection and analysis of different perspectives of key actors involved in the project. This is explained in detail in 2.3 below.
- (4) To oversee the collection and analysis of data for reflection and learning for comparative case studies. This is explained in detail in 2.4 below.
- (5) To develop communications and marketing collateral based on the information synthesised in work packages (1, 2 and 3). This is explained in detail in 2.5 below.

These tasks will be done on a rolling basis from 19.08.2024 to 29.05.2026 by the appointed contractor. All five objectives seek to measure the impact and results of the project on improving the employment prospects of young South Africans in a sustainable and increasingly decarbonised economy (Just Transition).

Under each task listed above the contractor is responsible for providing the following services:

2.1 Work package 1- Monitoring achievement of selected Module Objective Indicators 1, 2 and 3:

The contractor will be responsible for designing and administering monitoring tools, and reporting on module indicator 1, 2 and 3. The indicators are as follows:

Module objective indicator 1: *2,155 (70%) of a total of 3,078 participants in employment promotion measures, including 1,293 (60%) women, indicate that their employment situation has improved in respect of one of three criteria:*

- *Starting a new job in an employed capacity*
- *Starting self-employment*
- *Improvement in income or working conditions in an existing employment relationship*

Module objective indicator 2: 389 supported South African micro, small and medium-sized enterprises (MSMEs) and entrepreneurs have created a total of 389 jobs in South Africa.

Module objective indicator 3: 70% of 162 surveyed employers confirm that the professional skills taught in newly developed or adapted education and training courses for a sustainable, increasingly decarbonised economy (just transition) meet their needs.

2.1.1 The contractor will design and administer a survey to measure the number of participants who have improved their employment situation (module objective indicator 1), measure the number of jobs created by supported MSMEs (module objective indicator 2) and measure the satisfaction level of surveyed employers (module objective indicator 3). The contractor will develop tools for data collection based on the criteria to be provided by GIZ. The tools will be approved by GIZ prior to use. Once the tools have been approved, the contractor will pilot the tools and amend where necessary.

2.1.2 The contractor must propose a sampling method they think is suitable and is representative of the target group. The contractor must use a sampling method with replacements so that the total number sampled is reached. The contractor will be responsible for developing a sampling method for the following participants:

Module indicator 1	1916 participants
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The rest of population for module objective indicator 1 will be sampled from a different service provider. Therefore, the contractor must ensure that the selected sampling method can be aggregated into the population size of the module objective indicator.

In addition, the contractor will survey the following participants (this does not require sampling):

Module indicator 2	241 MSMEs and entrepreneurs
Module indicator 3	100 employers

CPD4E has various implementing partners working across South Africa under each module objective indicator. The implementing partners do not have the same number of participants therefore, the sample size will further be refined once the contract has started to ensure that the sample size is representative of all the implementing partners in each module objective indicator.

2.1.3 The contractor will conduct data collection using an online tool, the link should be sent via email, SMS and WhatsApp and follow up with telephone surveys and control data quality. An anonymised timestamped record of the telephone survey must be provided as evidence against telephone costs. Data will be collected six months after each training initiative has been completed. The contractor will also submit data quality control reports. The contractor will also manage data in accordance with General Data Protection Regulation (GDPR) and Protection of Personal Information Act (POPIA). Names and contact details of survey participants will be shared with the contractor by GIZ implementing partners. GIZ will organise an introductory meeting with all implementing partners.

2.1.4 The contractor must identify individual participants for potential case study development. The participants must show success due to the intervention. Special focus will be given to female participants and participants living with disabilities. The contractor must write a one-page report on each identified participant with enough information to assist in developing a case study. Once GIZ has approved the identified potential case studies, the contractor will conduct in-depth interviews with each participant and develop a full story for publication. The contractor must develop an interview questionnaire which will be approved by GIZ prior to use. At least two participants must be identified from each of the following intervention areas:

- Entrepreneurs or owners of micro or small enterprises who took part in support programmes offered for using the potential of the just transition to further develop their enterprises (related to output 2.2)
- Young South Africans participating in training measures in the area of the decarbonised economy (related to output 3.2)
- Young South Africans who took part in support measures for improving their transition to employment in business sectors relevant to a just transition (related to output 4.2)

2.1.5 The contractor will conduct the survey six months after each training has taken place. A dashboard report on findings and aggregated data and a narrative report will be submitted four to six weeks after the completion of the survey for each intervention and in line with GIZ reporting requirements and timelines. The contractor will also submit and present a final consolidated narrative report on the survey findings with data aggregated from all implementing partners. The final report must include descriptive data analysis looking at success rates of the interventions, discussion on which interventions are the most effective when promoting employment and which interventions are most effective in creating jobs when providing business support, a discussion on challenges and recommendations especially on improving support to women and improving implementation. The final report must include a gender-sensitive dashboard and report to indicators that specifically look at gender disaggregated data analysis, findings, and recommendations. GIZ will provide feedback and might require adjustments to the report if critical information is missing.

2.1.6 The survey should be designed and carried out in compliance with the BMZ standard indicators and related indicator definition sheets. A list of definitions is available in Annex 2. Indicator reference sheets will be shared with the contractor at the beginning of the contract. The standard indicators were introduced by the commissioning party BMZ. Standard indicators serve aggregation across projects and countries. Standard indicators under the topic of training and sustainable growth for good jobs are applicable in the CPD4E project. The following standard indicators apply:

3.1 Number of people who have completed a vocational training measure

3.3 Number of enterprises (MSME) that have contributed to vocational training measures or labour market services

3.4 Number of jobs created or secured

3.5 Number of people with higher income

3.6 Number of people with improved working conditions

3.7 Number of enterprises that have been supported in improving competitiveness

NB: A gender sensitive approach must be used. Data collection tools must include gender sensitive questions. Data must be gender disaggregated, for example, looking at how household roles, income and dependency has changed for women vs men. In addition, female enumerators should be conducting some of the interviews.

2.2 Work package 2-To oversee data collection, analysis and reporting for reflection and learning of participants in work placement programmes

- 2.2.1 CPD4E is aiming at training successfully 2,155 participants under module objective indicator 1 and want to check on them during their work placement. The contractor will develop a short electronic survey tool on participant work placement experiences and administer it to participants during their work placement. The objective of the survey is to verify that implementation activities are taking place as per project design and to collect participant perceptions on the implementation activities. Information from the survey will also be used to plan support where implementing partners are struggling with implementation. Survey tool will be based on GIZ criteria and shall be subject to approval by GIZ. The tool will be piloted and amended if necessary.
- 2.2.2 The contractor will conduct an electronic survey via email with a maximum of 216 participants, one participant per host employer (numbers to be refined at the beginning of the contract when all trainings are fixed). Follow up telephone survey should be conducted where there is low response rate. An anonymised timestamped record of the telephone survey must be provided as evidence against telephone costs. Data will be collected on a rolling basis, 6 months after the commencement of each training initiative or before the end of work placement, whichever comes first. The contractor will also manage data in accordance with General Data Protection Regulation (GDPR) and Protection of Personal Information Act (POPIA). Names and contact details of survey participants will be shared with the contractor by GIZ implementing partners. GIZ will organise an introductory meeting with all implementing partners.
- 2.2.3 The contractor will report on findings in line with GIZ reporting requirements. The report must detail the participants general experience in the workplace, especially for female participants, whether the participants feel the work placement is related to the training outcomes, highlight challenges and recommendations on how to address the identified risks and recommendations on how to improve the implementation. Reports are expected to be submitted within two to three weeks after the survey is conducted (per implementing partner, per cohort). GIZ will provide feedback on the report and might require adjustments to the report if critical information is missing.
- 2.2.4 The contractor will develop a short online questionnaire for programme drop-offs and follow up with telephone interviews to determine reasons for dropping off, suggestions for improving training and their current employment status and pathways. This is not more than 192 drop-offs, spread across all implementing partners. The questionnaire will be administered directly after completion of each cohort/training intervention. Aggregated data will be submitted four weeks after the survey has been completed. A narrative report will be submitted at the end of the contract. The report must provide recommendations on how to avoid drop-offs. The contractor will report on findings in line with GIZ reporting requirements.

Module indicator 1	192 drop offs
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The contractor will submit and present a draft report in a meeting based on work package 1 and 2, GIZ will provide feedback, and might require adjustments to the report if critical information is missing. The final report on work packages 1 and 2 must include possible recommendations for action based on the feedback from the meeting presentations.

2.3 Work package 3- Conduct KOMPASS

The contractor will be responsible for collecting qualitative data with relevant CPD4E stakeholders using KOMPASS¹ tools and methods. KOMPASS forms part of the Monitoring, Evaluation, Reflection and Learning (MERL) systems of GIZ projects. KOMPASS is the open recording of different perspectives of key actors involved in the project. KOMPASS assesses the views of actors who are familiar with the project, identifying blind spots and unintended results that were not taken into consideration during the planning and risk identification phase. It also reviews whether the theory of change reflects what is possible within the implementation context and whether the proposed results will be achieved and on the validity of the underlying hypothesis. A practical guide that gives examples of the successful application of the KOMPASS procedure will be shared at the beginning of the contract.

The contractor will be responsible for conducting KOMPASS, which will include the following:

- 2.3.1 Designing qualitative data collection tools, these include one-on-one interviews and focus group discussion (FGD). GIZ will have final approval of the tools before they are used. The contractor will be expected to pilot the tools before use.
- 2.3.2 The contractor will conduct in-depth interviews/FGD with a maximum of 18 key stakeholders involved in the project. At least two key stakeholders per intervention area must be interviewed. Final list of key stakeholders to be interviewed will be approved by GIZ. To get in touch with the stakeholders the contractor will be supported by GIZ, for example by organising a kick-off meeting. All interviews will be conducted online. The contractor will be expected to provide anonymised summaries of interviews with participants.
- 2.3.3 The contractor will be responsible for analysis of the data collected and writing final report in line with GIZ reporting requirements and timelines. The contractor will submit and present a report in a meeting, GIZ will provide feedback, and might require adjustments to the report if critical information is missing. The final report must include possible recommendations for action based on the feedback meeting presentation.

2.4 Work package 4- To oversee the collection and analysis of data for reflection and learning for comparative case studies

Monitoring and Evaluation is one of the focal areas for CPD4E to address the need for evidence-based decisions for project implementation. The role of M&E is beyond being just a reporting function, it also provides strategic direction on how best to achieve outcomes and impacts among beneficiaries and partners. M&E is used to reflect on the context of implementation and whether changes in the context have changed the way we should be

¹ German abbreviation, KOMPASS (Open recording of comparative perspectives of partners and target groups)

implementing the project. The CPD4E M&E system emphasises the importance of reflection and learning thus the contractor will be responsible for comparative case studies with the aim of providing lessons on how to ensure that implementation is achieving optimal results.

2.4.1 The contractor will conduct qualitative focus group discussions with the following female participants: students (4 groups), MSME owners/representatives (2 groups) and lecturers (2 groups). MSME and lecturer interviews will be conducted online. Student interviews will be in person, in four different areas. There must be at least 6 participants per focus group discussion. The contractor will be responsible for designing qualitative data collection tools. GIZ will have final approval of the tools before they are used. Final list of participants to be interviewed will be approved by GIZ. To get in touch with the participants the contractor will receive contact details of the participants from GIZ implementing partners. GIZ will organise an introductory meeting with all implementing partners. The contractor will be expected to provide anonymised summaries of interviews with participants.

2.4.2 The contractor will be responsible for analysis of the data collected and writing final report in line with GIZ reporting requirements and timelines. The final report must provide insight on perceptions on the design of the interventions by looking at the following but not limited to this list:

- Project effectiveness for woman
- Promoting gender equality and social inclusion such as gender norms and attitudes in the workforce, women representation in decision making roles and the workforce in general
- Supporting sustainable outcomes for women
- Promoting full participation and access

The report must include possible recommendations for gender-sensitive strategies. The findings of the final report must be used to develop one of the project impact factsheets to be developed under work package 5.

2.4.3 The contractor will be responsible for conducting comparative studies on interventions offered by different implementing partners in different locations. Three comparative studies will be conducted on three different intervention areas. A list of selected interventions will be provided by GIZ.

2.4.4 The contractor will conduct online interviews with 6 implementing partners and 6 facilitators/training providers. Reflections from young people and MSMEs participating in the selected interventions must be extracted from the data collected under work package 1 and 2. The contractor will be responsible for designing qualitative data collection tools. GIZ will have final approval of the tools before they are used. To get in touch with the stakeholders the contractor will be supported by GIZ, for example by organising a kick-off meeting. The contractor will be expected to provide anonymised summaries of interviews with participants.

2.4.5 The contractor will be responsible for analysis of the data collected and writing final report in line with GIZ reporting requirements and timelines. The final report must provide insight on the perceptions on the design of the interventions by looking at the following but not limited to this list:

- Implementation approaches
- Sustainability and scalability

- Success factors
- Cost effectiveness

The findings of the final report must be used to develop three of the project impact factsheets to be developed under work package 5.

2.5 Work package 5- Communication and Marketing Collateral

The contractor will be required to develop communications and marketing collateral based on the information synthesised in the work packages (1, 2, 3 and 4) to use for the purposes for engaging stakeholders, partners, and use on social media platforms. The contractor will be required to identify key learnings, best practices, recommendations, and project impact statistics emerging from the various interventions undertaken/implemented by CPD4E based on the findings developed in work packages 1-2 and selected findings from work package 3-4.

The contractor will be required to produce the following communications and marketing collateral to support the dissemination of the report results:

- 2.5.1 Develop and execute a communications plan to promote, disseminate the findings, learnings and recommendations developed in the work packages (1-2).
- 2.5.2 Identify various targeted platforms such as workshops, webinars, international/national and/or local conference events to disseminate, promote and present the report findings.
- 2.5.3 Organise, facilitate and host X2 public webinars to present the report findings. The contractor will be required to use its own targeted networks channels, invite relevant stakeholder to participate in the public webinars. For each webinar, the contractor must ensure an attendance of at least 80 attendees. Coordination with the GIZ Team will be required. The webinar must be recorded, and the record shared with GIZ.
- 2.5.4 Develop, design and layout X10 project impact factsheets using the case study reports, the research report (work packages 1-4) and CPD4E internal monitoring reports.
- 2.5.5 Develop, design and layout X30 infographics which will be used for visual presentation on the report findings, presentations for the steering committee and other external presentations conducted by the CPD4E team.
- 2.5.6 Create and develop X2 short (3-5 minutes) video clips to highlight the report findings and impact achieved. The video clips should include a short interview with the CPD4E stakeholders, implementing partners, participants, Head of the Project, Cluster Coordinator and Country Office Director.

When the final reports for all five work packages have been approved by GIZ, the contractor will provide a project closeout report. The closeout report will detail important project aspects, record variances around the timelines, scope, and reporting timelines. The report should be utilisation-oriented and promote learning. Certain milestones, as laid out in the table below, are to be achieved during the contract term:

Milestones/partial works	Deadline/place/person responsible
An inception report detailing the plan implementation approach of each work package and timelines, approved by GIZ	Within one month after the start of the contract, Pretoria, contractor

A communication plan for work package 1 and 2 (to be inserted in the inception report)	Within one month after the start of the contract, Pretoria, contractor
Designing of data collection tools and piloting of tools, approved by GIZ	Within two months after the start of the contract, Pretoria, contractor
Data collection and analysis	Within four months after the start of the contract, Pretoria, contractor
Work package 1: Reports on findings for each implementing partner/consolidated report with aggregated data, approved by GIZ	6 months after completion of each training initiative, Pretoria, contractor
Report based on work package 2: Reports on findings for each implementing partner	6 months after the start of each training initiative, Pretoria, contractor
KOMPASS report presented to GIZ after preliminary findings from the meeting	Within 12 months after the start of the contract, Pretoria, contractor
Work package 5: final design and layout of infographics, approved by GIZ	31.01.2025, Pretoria, contractor
Final consolidated report based on work package 1 and 2, presented to GIZ after preliminary findings from the meeting	30.04.2026, Pretoria, contractor
Final report based on work package 4, approved by GIZ	30.04.2026, Pretoria, contractor
Work package 5: final design and layout of factsheets and video development, approved by GIZ	30.04.2026, Pretoria, contractor
Work package 5: host public webinars and attend targeted events to disseminate, promote and present report findings	29.05.2026, Pretoria, contractor
Brief project close-out report detailing project implementation and any variations from inception report and workplan, approved by GIZ	29.05.2026, Pretoria, contractor

Period of assignment: from 20.09.2024 until 29.05.2026.

3. Concept

In the tender, the contractor is required to show *how* the objectives defined in Chapter 2 and their objectives in Chapter 1 are to be achieved, if applicable under consideration of further method-related requirements (technical-methodological concept). In addition, the contractor 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 contractor 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) (criteria 1.1.1 in the technical assessment grid). Following this, the contractor presents and justifies the explicit strategy with which it intends to provide the services for which it is responsible (see Chapter 2 Tasks) (criteria 1.1.2 in the technical assessment grid). The contractor is expected to provide

an analytical approach and data collection methodology as part of their strategy. The contractor must also demonstrate an understanding of tracer studies and the skills eco-system in South Africa with a focus on employment promotion in decarbonised economies (just transition). (Max. 5 pages)

The contractor is required to access survey respondent details from implementing partners. The contractor is required to present and explain its approach to the relevant implementing partners and describe the **cooperation (1.2)** with them (criteria 1.2.1 & 1.2.2 in the technical assessment grid). (Max. 1 page).

The contractor is required to present and explain its approach to **steering** the measures with the project partners (1.3.1 in the technical assessment grid) and its contribution to the **results-based monitoring system** (1.3.2 in the technical assessment grid). (Max. 2 pages)

The contractor is required to describe the key **processes** for the services for which it is responsible and create an **operational plan** or schedule (criteria 1.4.1 in the technical assessment grid) that describes how the services according to Chapter 2 are to be provided. In particular, the contractor is required to describe the necessary work steps and, if applicable, take account of the milestones and **contributions** of other actors in accordance with Chapter 2 (criteria 1.4.2 in the technical assessment grid). (Max. 3 pages).

Project management of the contractor (1.6)

The contractor is required to explain its approach for **coordination with the GIZ project** (criteria 1.6.1 in the technical assessment grid). In particular, the project management requirements specified in Chapter 2 must be explained in detail. The contractor must liaise directly with the implementing partners/stakeholders for contact lists and ensure that they are complete and updated.

The contractor is required to draw up a **personnel assignment plan** (criteria 1.6.2 in the technical assessment grid) with explanatory notes that lists all the experts proposed in the tender and their roles; 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. (Max. 1 page).

Further requirements (1.7)

The contractor is required to use gender sensitive approaches. This is important in helping CPD4E understand the extent to which the intervention is effective in terms of supporting interventions tailored to the needs of girls and young women for improving their transition to employment. The contractor is required to provide a strategy of how they will ensure **gender sensitive** approach during the data collection and analyses. The methodology used should include gender sensitive questions, sex-disaggregated data, inclusion of women in key informant interviews and gender analysis approach. The contractor must deliver the tasks in Chapter 2 using a process that prevents further discrimination and exclusion of women. (Max.2 page).

4. Personnel concept

The contractor is required to provide personnel who are suited to filling the positions described, on the basis of their curriculum vitae (CV) (see Chapter □), 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

- The lead consultant has the overall responsibility for the work packages of the contractor (quality and deadlines) and for personnel management. He/she is responsible for data analysis and report writing and providing technical oversight (quality assurance) on all work completed.
- He/she is coordinating and managing the project and ensuring communication with GIZ, partners and others involved in the project. The lead consultant is responsible for results and reporting in accordance with deadlines.
- Personnel management, in particular identifying the need for short-term assignments within the available budget, as well as planning and steering assignments and supporting short-term assignments.
- Regular reporting in accordance with deadlines

Qualifications of the team leader

- Education/training (2.1.1): university degree (Masters degree) in Development Studies, Economics, Monitoring and Evaluation, Social Sciences or Equivalent
- Language (2.1.2): C1-level language proficiency in English according to the Common European Framework of Reference for Language (CEFR)
- General professional experience (2.1.3): 10 years of professional experience in research, monitoring and evaluation
- Specific professional experience (2.1.4): 10 years in consulting programmes in the TVET/skills development and employment promotion in South Africa
- 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): not applicable
- Development cooperation (DC) experience (2.1.7): not applicable
- Other (2.1.8): not applicable

Key expert 1

Tasks of key expert 1

- Assist team lead with work package 1 and 2
- Development of data collection tools
- Ensure data quality
- Ensure data is managed in line with GDPR guidelines and POPIA
- Analysis of quantitative data using statistical software
- Data visualization of analysed data
- Data analysis and report writing

Qualifications of key expert 1

- Education/training (2.2.1): University qualification (Masters degree) in Development Studies, Economics, Monitoring and Evaluation, Statistics or Data Science
- Language (2.2.2): C1 -level language proficiency in English according to CEFR
- General professional experience (2.2.3): 5 years of professional experience in quantitative data analysis and visualisation

- Specific professional experience (2.2.4): 3 years of experience in designing survey tools and data collection for TVET/kills development and employment promotion
- Leadership/management experience (2.2.5): not applicable
- Regional experience (2.2.6): not applicable
- Development Cooperation (DC) experience (2.2.7): not applicable
- Other (2.2.8): not applicable

Key expert 2

Tasks of key expert 2

- Assist team lead with work package 2, 3 and 4
- Provide gender expertise
- Development of data collection tools
- Ensure data quality
- Ensure data is managed in line with GDPR guidelines and POPIA
- Undertake qualitative data analysis and report writing

Qualifications of key expert 2

- Education/training (2.2.1): University qualification (Masters degree) in Development Studies, Gender Studies, Economics, Monitoring and Evaluation, Social Sciences
- Language (2.2.2): C1 -level language proficiency in English according to CEFR
- General professional experience (2.2.3): 5 years of professional experience in research, monitoring and evaluation
- Specific professional experience (2.2.4): 3 years of experience in research in skills development, employment promotion in large scale research studies. 3 years of experience in conducting gender focused research studies or equity research studies
- Leadership/management experience (2.2.5): not applicable
- Regional experience (2.2.6): not applicable
- Development Cooperation (DC) experience (2.2.7): not applicable
- Other (2.2.8): not applicable

Key expert 3

Tasks of key expert 3

- Assist team lead with work package 5
- Undertake identification of communications avenues to disseminate findings and development of communications and marketing collateral

Qualifications of key expert 3

- Education/training (2.2.1): University qualification (National Diploma) in Marketing Communications, Advertising and Public Relations, Digital Marketing and Graphic Design
- Language (2.2.2): C1 -level language proficiency in English according to CEFR
- General professional experience (2.2.3): 5 years of professional experience in Marketing, Communication PR, Graphic Design and Digital Marketing
- Specific professional experience (2.2.4): 3 years of experience in strategic PR and communications, videography, graphic design, digital marketing
- Leadership/management experience (2.2.5): not applicable
- Regional experience (2.2.6): not applicable
- Development Cooperation (DC) experience (2.2.7): not applicable
- Other (2.2.8): not applicable

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
- Gender expertise

Short-term expert pool with the minimum of 2

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. In compliance with the gender sensitive approach, some of the pool members must be females. The pool members must represent the following group: youth and people with disabilities.

Tasks of the short-term expert pool

- Support the team leader and experts.
- Transcribe KOMPASS interviews.
- Make follow up phone calls to survey participants and/or conduct interviews for the surveys.

Qualifications of the short-term expert pool

- Education/training (2.6.1): All experts with university qualification (Bachelor's degree) in Monitoring and Evaluation, Development Studies, Social Sciences, Economics or Statistics
- Language (2.6.2): All experts with C1-level language proficiency in English according to CEFR
- General professional experience (2.6.3): All experts with 2 years of professional experience in conducting research studies, data collection, conducting online and telephone surveys
- Specific professional experience (2.6.4): All experts with 1 years of professional experience in monitoring employment effects
- Regional experience (2.6.5): not applicable
- Development cooperation (DC) experience (2.6.6): not applicable
- Other (2.6.7): not applicable

The contractor 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>).

	Hours	Cape Town/Gauteng	South Africa
Per-diem allowance in country of assignment	8-24 hrs	R380.00	R340.00
	24 hrs	R490.00	R440.00
Overnight allowance in country of assignment	R1500.00		

Accommodation costs which exceed this up to a reasonable amount and the cost of flights and other main forms of transport can be reimbursed in accordance with the South Africa country table in the GIZ travel expenses guidelines as a lump sum upon the submission of documentary proof.

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	35	35	35 expert days in the country of assignment (South Africa), against evidence (timesheets)
Designation of key expert 1	1	37	37	37 expert days in the country of assignment (South Africa), against evidence (timesheets)

Designation of key expert 2	1	56	56	56 expert days in the country of assignment (South Africa), against evidence (timesheets)
Designation of key expert 3	1	39	39	39 expert days in the country of assignment (South Africa), against evidence (timesheets)
Designation of short-term expert pool 1	2	39	78	78 expert days in the country of assignment (South Africa), against evidence (timesheets)
Transport	Quantity	Number of days per expert	Total	Comments
Fixed travel budget	4	4.5	18	<p>A budget is earmarked for travel expenses within South Africa.</p> <p>A fixed budget of ZAR 233.492,00 is earmarked for settling travel expenses against evidence.</p> <p>This fixed budget includes:</p> <ul style="list-style-type: none"> • 36 Domestic flights within the country of assignment during service delivery • 36 CO₂ emissions Compensation • 20 Per diem allowances (see table above) • 16 Overnight accommodation allowance (see table above) • 13 Transportations to visit GIZ offices, Pretoria and to visit sites for video recording. <p>The costs are reimbursed in accordance with the country table for South Africa in the GIZ travel expenses guidelines – per diem and accommodation as a lump sum, and all other travel and travel related costs against evidence. All travels must be agreed in advance by the officer responsible for the project. Travel expenses must be kept as low as possible.</p>

Other costs	Number	Price	Total in ZAR	Comments
Flexible remuneration	1	205.110,05	205.110,05	A budget of ZAR 205.110,05 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.
Workshops (fixed budget for hosting webinar)	2	83.142,50	166.285,00	The budget contains the following costs procurement of 6 experts to be part of the panel and 2 facilitators, against evidence.
Budget for telephone costs	1148	36,00	41.328,00	30 minutes per participant, against evidence.

Workshops and training

GIZ holds numerous events that have great potential for showcasing the three dimensions of sustainability – environmental, social, and economic – and thus for making our corporate values visible through concrete action. The general definition of an event is a gathering of three and more participants. This means that basic sustainability criteria must be observed.

When planning the agenda, the contractor will ensure that the event starts and finishes at a family and travel-friendly time (08:30 – 16:00). Make sure that panels have an equal number of men and women. Use gender-sensitive language. Furthermore, the organiser will ensure barrier-free accessibility in line with the target group needs. Further details on GIZ sustainable event management are available in Annex 3.

The contractor implements the following webinars:

- Public webinar to present the report findings (work package 5)

6. Inputs of GIZ or other actors

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

- Connection to relevant stakeholders
- Regular consultations and clarification of questions as needed
- GIZ will introduce the contractor to implementing partners. Implementing partners to provide updated contact details of participants

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 technical-methodological concept must not exceed 14 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.

The contractor must also provide examples of three (3) similar scope and size through a brief description of the project, the dates and who the services were provided for. References may be included as external content links. Please identify the external content with its date of creation. Date of reference may not lie outside the tender deadline.

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.

The contractor must provide a detailed data protection compliance strategy. The contractor must ensure that the system used for data collection meets GDPR and POPIA requirements for data protection.

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, meetings or budgets in full. The number of days, trips and workshops, meetings and the budgets will be contractually agreed as maximum limits. The specifications for pricing are defined in the price schedule.

8. Option

After the services put out to tender have been completed, important elements of these tasks can be continued or extended within the context of the basic project. Specifically:

Type and scope

The contractor is responsible for providing the following optional services:

- Conduct survey on module objective indicators
- Oversee the collection and analysis of data for reflection and learning on participants in work placement programmes
- Oversee the collection and analysis of data for reflection and learning for comparative case studies
- Develop communications and marketing collateral

Requirements

Exercising the option will depend on the contract for the extension of the project is awarded by GIZ's commissioning party. Additional tasks or funds will be provided to GIZ by the commissioning party (BMZ) or another funding party. The decision on continuation is expected to be made in the period between 01.11.2024 and 31.03.2025. If the option is exercised, it is anticipated that the contract term will be extended to 31.05.2028.

Exercising the option will depend on the following prerequisites:

- Satisfactory delivery service by the contractor at the discretion of GIZ and its partners
- The extension will be up to the value of the initial contract.

The option will be exercised by means of a contract extension on the basis of the individual approaches already offered.

Quantitative requirements for the optional services

Fee days	Number of experts	Number of days per expert	Total	Comments
Designation of Team Leader	1	18	18	18 expert days in the country of assignment (South Africa), against evidence (timesheets)
Designation of key expert 1	1	28	28	28 expert days in the country of assignment (South Africa), against evidence (timesheets)
Designation of key expert 2	1	21	21	21 expert days in the country of assignment (South Africa), against evidence (timesheets)
Designation of key expert 3	1	6	6	6 expert days in the country of assignment (South Africa), against evidence (timesheets)
Designation of short-term expert pool 1	2	30	60	60 expert days in the country of assignment (South Africa), against evidence (timesheets)
Transport	Quantity	Number of days per expert	Total	Comments
Fixed travel budget	3	2	6	<p>A budget is earmarked for travel expenses within South Africa.</p> <p>A fixed budget of ZAR 76,244 is earmarked for settling travel expenses against evidence.</p> <p>This fixed budget includes:</p> <ul style="list-style-type: none"> • 12 Domestic flights within the country of assignment during service delivery • 12 CO₂ emissions Compensation • 6 Per diem allowances (see table above)

				<ul style="list-style-type: none"> • 6 Overnight accommodation allowance (see table above) • 2 Transportations to visit GIZ offices, Pretoria and to visit sites for video recording. <p>The costs are reimbursed in accordance with the country table for South Africa in the GIZ travel expenses guidelines – per diem and accommodation as a lump sum, and all other travel and travel related costs against evidence. All travels must be agreed in advance by the officer responsible for the project. Travel expenses must be kept as low as possible.</p>
Other costs	Quantity	Price	Total in ZAR	Comments
Flexible remuneration	1	99.232.00	99.232.00	A budget of ZAR 99.232.00 is earmarked for flexible remuneration. Please incorporate this budget into the price schedule. Use of the flexible remuneration item requires prior written approval from GIZ.
Budget for telephone costs	1280	36,00	46.080,00	The budget contains the following costs: 30 minutes per participant, against evidence.

Requirements on the format of the tender for the option

Please complete both spreadsheets in the price schedule, i.e. one for the main service and one for the optional service.

9. Outsourced processing of personal data

GIZ does not have access to personal data for survey or interview participants (work package 1, 2 and 4) hence the contractor must access this information from implementing partners. The GIZ implementing partners will share their existing updated contact list of the survey participants. Implementing partners handle the participant's personal data according to their organisational rules and POPIA. It is advised that a contractual agreement on data protection is concluded between the contractor and the implementing partners. GIZ supports the contractor in getting in touch with the stakeholders for the KOMPASS interviews and FGD but will not provide him with any personal data for this purpose (work package 3).

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. If, in individual cases such as recordings of webinars with speaker, short videos for the website with people acting or pictures of participants for the website, the contractor transfers these to GIZ, it shall ensure that the consent of the data subjects has been obtained.

10. Annexes

- Annex 1 – BMZ results matrix
- Annex 2 – Definition list
- Annex 3 - Minimum standards for sustainable event management at GIZ