
TERMS OF REFERENCE

THE APPOINTMENT OF FIDUCIARY & OPERATIONAL RESOURCES (RST11-RST14) TO THE REFORM SUPPORT TEAM (RST) FOR THE NATIONAL TREASURY'S METRO TRADING SERVICES REFORM

Programme Identification

Name of Client	National Treasury (NT)
Name of Project	Cities Support Programme (CSP) 3 Procurement Support
Contracting Authority	Government Technical Advisory Centre (GTAC)
Accountable Officer	Ndimphiwe Jamile: Acting CD: NDPP
Budget Manager	Ndimphiwe Jamile: Acting CD: NDPP
Project Purpose	GTAC seeks to appoint on behalf of CSP, fiduciary and operational specialist (RST11 – 14) as part of the Reform Support Team for the Metro Trading Services Reform

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1. BACKGROUND INFORMATION

South Africa's eight metropolitan municipalities (metros) are home to approximately 40% of the national population, spread across 30,000 square kilometers, and generate 85% of the country's economic activity. Recognized in the National Development Plan 2030, metros form the backbone of the national economy, providing essential services like water supply and sanitation (WSS), electricity, and solid waste management (SWM), collectively known as 'trading services', to both residents and industrial customers. Trading services (TS) are services for which consumption charges are levied and determined with the intention of making a surplus (profit) on the delivery of the services. Urbanization compounded with the enduring legacy of apartheid spatial planning has led to pronounced spatial challenges and inefficiencies. These include spatial injustice and inequality, where the urban poor tend to settle in peripheral urban areas far from social and economic opportunities.

South Africa's metros are facing a crisis in the provision of basic services, driven by a deterioration in functions that are central to effective city management including accountability, financial, and operational performance. The significant decline over the last 10 years is due to several factors: i) low collection rates resulting in loss of revenues; ii) trading services departments not having full control of the revenue cycle (governance failures); iii) lack of financial transparency and suboptimal procurement processes; iv) lack of proper asset management; and v) underinvestment in infrastructure operations and maintenance. In many metros, the sustained deterioration of trading services infrastructure has been associated with poorly defined lines of accountability, with support services such as finance and collections, human resources, supply chain management, information technology, and fleet management, often fragmented under separate units (e.g., Executive Directors or Heads of Departments) of the metro administration. Despite efforts to modernize and transform network industries, including electricity and water under phase 1 of Operation Vulindlela, a joint initiative of the Presidency and National Treasury (NT), urgent action is needed to reverse the rapid deterioration and increasing vulnerability to shocks of urban services and support the turnaround of trading services to improve the quality of life and resilience for metropolitan residents.

To address this, national government, led by the National Treasury in collaboration with relevant national departments, has initiated a six-year reform agenda which will provide performance-based conditional grants to the metros to incentivise improvement in service delivery in the three trading services (water supply and sanitation, electricity and solid waste). The Metro Trading Services Reform (MTSR) aims to introduce a new grant to incentivize the turnaround of metro trading service (TS) performance through institutional reform and increased investment, including an enhanced role for private sector investments. Performance improvements will be underpinned through targeted reforms and actions in (i) accountability, (ii) financial performance and (iii) operational performance.

The Metro Trading Services Reform is anchored in phase 2 of Operation Vulindlela which includes local government as a priority reform area. The Metro Trading Services Reform leverages a set of reforms aligned with various national policy objectives emanating from NT, the Department of Water & Sanitation (DWS), the Department of Electricity and Energy (DEE), the Department of Forestry, Fisheries and the Environment (DFFE), the Department of Cooperative Governance (DCOG), and the National Department of Human Settlements. These reforms are briefly summarized as follows:

- institutional/structural reforms to improve accountability and governance for the trading service at metro level, by incentivizing effective management through establishing a single point of management accountability (including control over essential support services) and attending to management and technical capability.
- reforms to increase the financial performance of the trading services, through increased transparency of financial data, improved operating cost recovery, and improved financial

relationship between the metro and each trading service, facilitated through full implementation of the mSCOA;

- reforms to improve the performance orientation of capital grants provided to metros for infrastructure investment in trading services. Grant reforms through restructuring existing grants and introduction of a new performance-based grant as a fiscal incentive for metros to undertake these reforms and increase investment in trading services; and
- reforms to address root causes of the deteriorating performance of local government, under phase 2 of Operation Vulindlela.

Under section 154 of the Constitution, national government provides support to municipalities to strengthen service delivery. For more than a decade, NT has been implementing an umbrella support programme through its Intergovernmental Relations (IGR) division to enable cities to address the inefficiencies in the built environment and drive meaningful change. The Cities Support Programme (CSP) focuses on strengthening the intergovernmental environment for this agenda, improving performance and strengthening governance towards inclusive economic growth. Considering the multi-sectoral challenges that are faced by the metros, IGR coordinates and collaborates with government stakeholders across the three spheres of government.

The Metro Trading Services Reform consists of a new targeted performance-based fiscal transfer (grant) to the Metros (the Metro Trading Services Component of the Urban Development Financing Grant, UDFG) that will be allocated to metros on achievement of specific results over the next six years. To participate in the Programme, Metros are preparing sector-specific PIAPs for each trading service using prescribed templates developed by NT. The PIAPs must reflect clear targets as well as a six-year budget envelope for proposed activities to achieve those targets, with sources of funding identified (MTSG and other sources). Metros must obtain Council approval for each PIAP as a sign of commitment and submit the plan to NT for technical review and approval to be considered eligible for inclusion in the programme and grant allocation.

This document sets out the context for the appointment of fiduciary and operational resources to the Reform Support Team within the CSP to support implementation of the trading services reform for an initial period of three years from June 2026 to December 2028, with the option to extend for an additional two years to December 2030.

This scope of work is for the operational and fiduciary experts in the Reform Support Team. A separate procurement is being conducted for technical experts of the Reform Support Team.

1.1 PROGRAMME OBJECTIVES, RATIONALE AND PRIORITIES

While South Africa's local government infrastructure grant system endows municipalities with substantial fiscal resources to support investments in municipal infrastructure, especially to the metropolitan municipalities, it lacks effective incentives that focus on results. This has resulted in inefficient spending of infrastructure grants, leading to under investment and deferred maintenance in municipal services and infrastructure and deterioration in the service-delivery performance of the Trading Services across all South Africa's Metros. To address this problem, the NT has established the Metro Trading Services Reform. The core intended result of the reform is a profound improvement in the operating and financial performance of the Trading Services organizations and a robust strengthening of the institutional systems which underpins this performance. The overall outcome is a sustained enhancement of the quality and reliability of water supply and wastewater, electricity and solid waste management services across the Metros.

The objective of the Metro Trading Services Reform is to improve the accountability, financial and operational performance of trading services in South Africa’s metropolitan municipalities. The rationale for the MTSR is that accountability, financial and operational measures are critical to improve the performance of water and sanitation, electricity and solid waste management trading services. The reform’s results areas outline clear activities and outputs towards the achievement of performance outcomes that will lead to improved trading services, ultimately contributing to enhanced service reliability, quality and financial sustainability in the long-term. The impact of these improvements over the long term is improved living conditions in the metropolitan municipalities, business climate, economic growth and job creation.

The following outcome indicators will be used to measure the achievement of the objective:

- Indicator 1. Metros that have met and maintained the Programme’s Minimum Commitments (MCs) (number).
- Indicator 2. Non-revenue Water (NRW) reduction in South Africa’s metros as a result of the Programme (percentage).
- Indicator 3. Electricity losses reduction in South Africa’s metros as a result of the Programme (percentage).

The following results areas will deliver on the outcome indicators and the programme objective:

- **Results Area 1: Improve Accountability Performance of Metro Trading Services.** Reforming metros’ institutional structures and governance processes to improve the management of the Trading Services businesses through (a) establishment of a single point of management accountability for each trading service including, among other issues, (i) appointing the head of Trading Services Department and (ii) delegating all relevant functions to the TS such as procurement and financial management to the head of said Department; and (b) improving the financial transparency of Trading Services including through issuing of separate Audited Financial Statements.
- **Results Area 2: Improve Financial Performance of Metro Trading Services.** Enhancing the Metro’s financial management of their Trading Services by: (a) implementing relevant cost-reduction and revenue improvement initiatives; (b) assigning the benefits (increased cash operating surpluses) to the Trading Service concerned; and (c) ensuring that increased surpluses are used to fund priority Trading Service investments.
- **Results Area 3: Improve Operational Performance of Metro Trading Services.**

Enhancing the Metro’s operational performance in Water and Sanitation Services (WSS) operations, including through: (a) improving water security; (b) rehabilitation and expansion of networks and infrastructure/assets; and (c) improving operations of WSS networks and plants, including NRW, through improved systems, data management and digitalization.

Enhancing the Metro’s operational performance in Electricity and Energy operations, including through: (a) the rehabilitation/replacement of distribution networks infrastructure to improve network operations; (b) upgrading billing, collection and vending systems to improve system efficiency; and (c) deploying Management Information System (MIS) and smart metering, reliability monitoring to improve data quality and management.

Enhancing the Metros operational performance in Solid Waste Management (SWM) operations, including through: (a) rehabilitation/replacement of SWM systems; (b) improvements in landfill management; and (c) implementation of waste management information systems to improve data quality and management.

1.2 PROGRAMME MANAGEMENT

Management and implementation of the Metro Trading Services Reform will be undertaken through the National Treasury with specific functions established for grant regulation, financing, alignment with infrastructure reforms, metro oversight, delivery and support, and grant administration. The Reform will be implemented under the oversight of a Multi-Sectoral National Steering Committee, chaired by NT with representation from national departments and other role-players involved in the three trading services. At the metro level, the accounting officer will oversee coordination of reform implementation.

Within the National Treasury, the Intergovernmental Relations Division is responsible for coordination of the Metro Trading Services Reform (see figure 1). Within IGR, two teams perform particular functions in support of the Metro Trading Services Reform, namely:

- the Reform Support Team (RST) within the Cities Support Programme (CSP) and
- the Grant Administration Team (GAT) in the Neighbourhood Development Partnership Programme (NDPP).

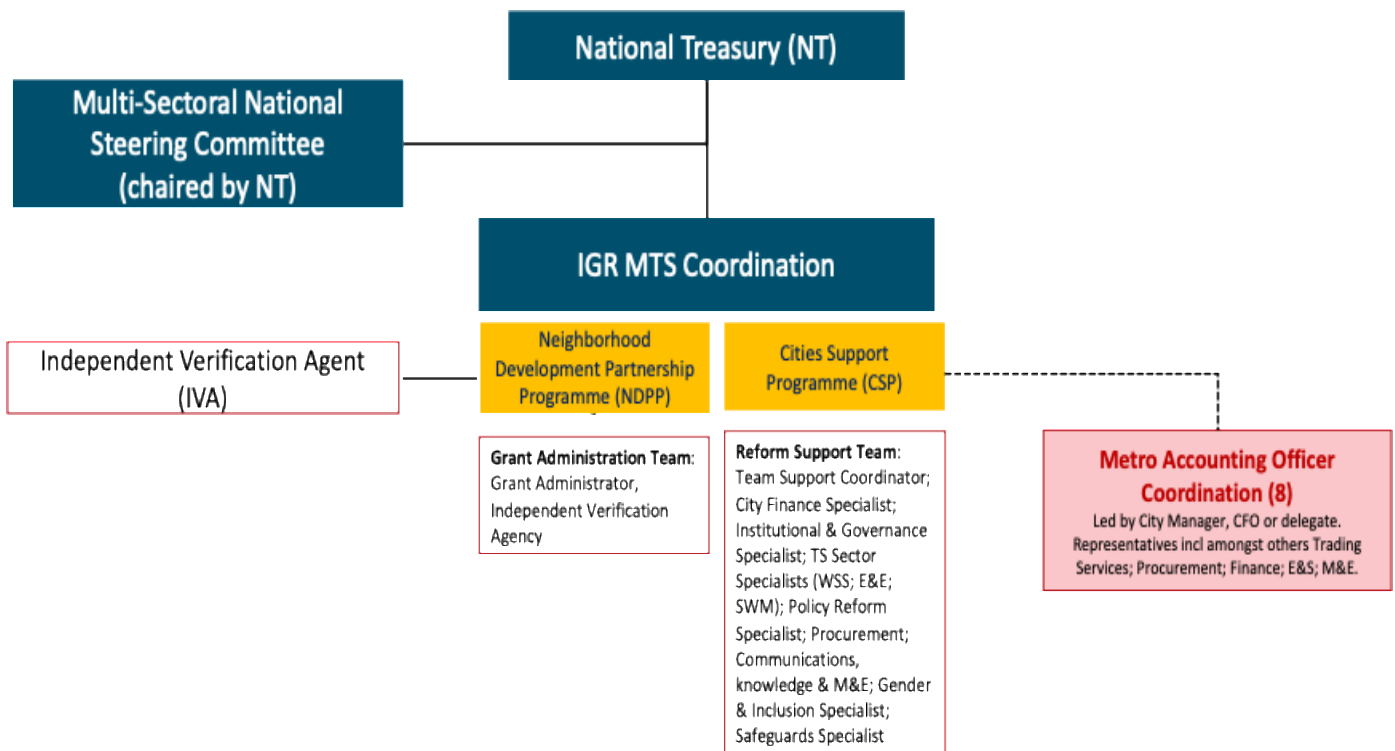


Figure 1 Implementation arrangements for the Metro Trading Services Reform

1. **The Reform Support Team (RST)** is responsible for providing support to the eight metros and the 24 trading services in preparing, reviewing and implementing the PIAPs as well as support in reporting on the PIAPs. The RST will also mobilise and coordinate the delivery of a significant programme of technical assistance to metros and their trading services in support of reform implementation. Technical assistance will also be offered to national departments to support their role in the reform. The RST will be led by the CSP's Climate Resilience and Sustainable Services Lead who reports to the CSP's Programme Manager. **The Reform Support Team operational and fiduciary specialists responsible for Finance, Operations, Procurement, Environmental and Social Safeguards, Gender and Inclusion, amongst others, is the focus of this procurement.**

2. **A separate procurement is underway** for Reform Support Team **technical** specialists responsible for City Finance, Institutional and Governance, TS Sectors, and Communications, Knowledge, Monitoring and Evaluation.
3. **The Grant Administration Team** is tasked with administration of the MTSG and the flow of funds between NT and the Metros, reviewing metro progress reports and advising NT regarding disbursement requests to be submitted to the WB, appointment and management of the Independent Verification Agent and managing its contract, and reporting to the Multi-Sectoral Steering Committee, among other functions. The GAT will be led by a Grant Administrator, with access to a contracted independent verification agency.

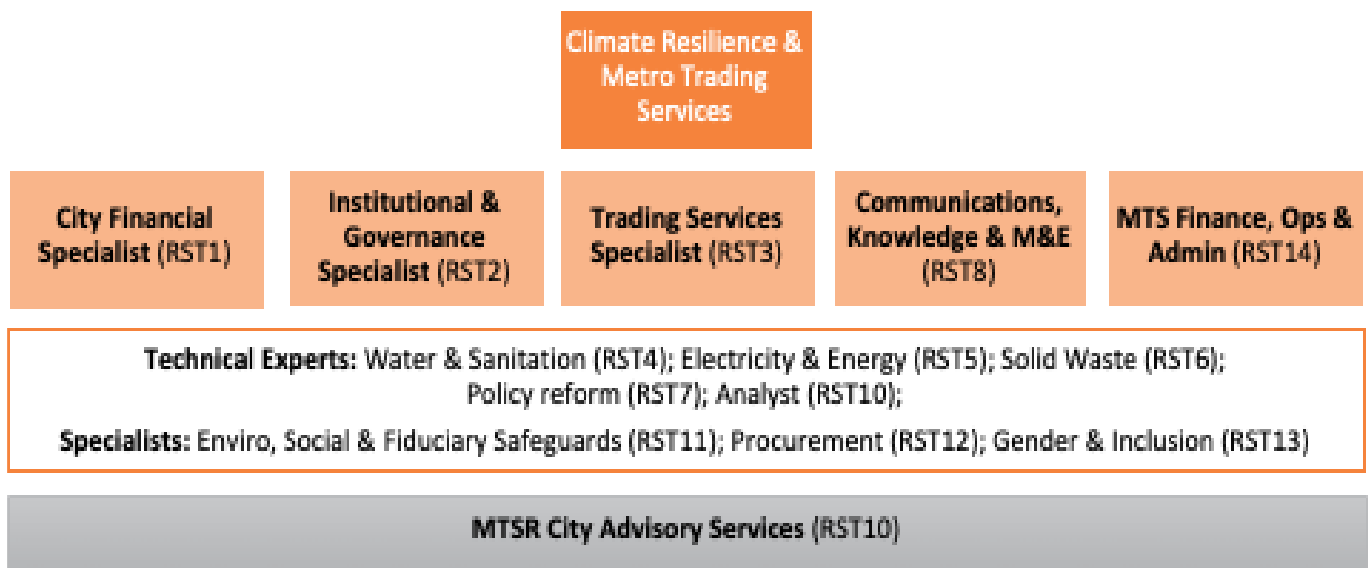
The following fiduciary and operational specialists to be procured through these Terms of Reference will form part of the Reform Support Team:

RST11: Environmental, Social and Fiduciary Safeguards Specialist/s

RST12: Procurement Specialist/s

RST13: Gender and Inclusion Specialist/s

RST14: Finance, Operations and Admin Coordinator



2. THE SCOPE OF WORK

The scope of work is for the appointment of fiduciary and operational specialists (RST11-14) as part of the Reform Support Team for the MTR, as defined by terms of reference as contained herein.

2.1 APPOINTMENT

To appoint a company who will source the relevant individuals to fulfil all requirements of the Scope of Work and Terms of Reference.

3. TECHNICAL EXPERTISE REQUIRED

The Metro Trading Services Coordination Team requires the following fiduciary and operational resources to be appointed to the Reform Support Team:

Code	Resource
RST11	Environmental, Social and Fiduciary Safeguards Specialist/s
RST12	Procurement Specialist/s
RST13	Gender and Inclusion Specialist/s
RST14	Finance, Operations and Admin Coordinator

RST11: Environmental, Social and Fiduciary Safeguards Specialists

Position	RST11: Environmental, Social and Fiduciary Safeguards Specialists
Objective	Provide strategic support to the National Treasury and metropolitan municipalities to strengthen environmental, social, and fiduciary safeguards by screening proposed projects for compliance with national and lender requirements.
Scope	<ul style="list-style-type: none"> • Provide strategic technical support to the National Treasury and participating metro municipalities to ensure effective integration of environmental, social, and fiduciary safeguards in the planning, execution, and monitoring of reform initiatives. • Support metros to develop or strengthen (as needed) Environmental and Social Management Systems (ESMS) to institutionalise safeguards compliance and manage environmental and social risks across trading services infrastructure and operations. • Screen proposed metro projects and spending plans to assess alignment with South African legislation and lender environmental and social requirements (as applicable), identifying risks, restrictions or exclusions. • Assist metros and the National Treasury to restructure investments that fall under environmental or social exclusion lists, especially in solid waste management, or identify alternative financing pathways. • Guide the integration of safeguard considerations into metro turnaround strategies, investment plans, and institutional roadmaps to support sustainable and inclusive service delivery. • Monitor the implementation of safeguard commitments, recommend corrective actions, and contribute to internal and donor reporting on safeguards performance. • Develop tools, templates, and learning resources to build metro-level capability and promote consistent application of safeguard principles across the reform. • Support the identification and reporting of potential fraud and corruption risks, in line with National Treasury and lender anti-corruption policies
Key results areas and outputs	<ol style="list-style-type: none"> 1. Environmental and Social Management Systems (ESMS) <ul style="list-style-type: none"> • Diagnostic assessments of existing metro safeguards systems and capacity. • ESMS frameworks, procedures, and tools tailored to metro needs and aligned with reform priorities. 2. Project Screening and Compliance <ul style="list-style-type: none"> • Screening proposed metro investments for environmental and social risks, and programme exclusions.

Position	RST11: Environmental, Social and Fiduciary Safeguards Specialists
	<ul style="list-style-type: none"> • Support compliance with national law, licences and or permit conditions and funder environmental and social requirements, as needed. 3. Exclusion Risk Management and Financing Alternatives • Identification of projects subject to programme exclusions. • Alternative financing or project restructuring recommendations to preserve service delivery goals. 4. Monitoring, Reporting, incl. Fraud & Fiduciary Risk, and Knowledge Products • Safeguards progress reports and risk tracking updates. • Practical guidance materials and tools for municipal and Treasury teams. • Procedures or protocols for identifying, documenting, and escalating, operations with high environmental risks, non-compliance and suspected fraud or corruption in relation to safeguards implementation and fiduciary oversight. • Contributions to reports that include tracking of integrity-related risks. 5. Knowledge and Learning • Case studies and briefs documenting inclusive practices and innovations. Content for awareness, or peer learning with National Treasury and metro teams. 6. Stakeholder Engagement and Integration • Records of stakeholder engagement. • Contributions to stakeholder engagement processes. • Input into metro business plans and investment projects on safeguards.
Skills and qualifications	<ul style="list-style-type: none"> • Postgraduate degree in environmental science and/or social development • Extensive experience in designing and operationalising Environmental and Social Management Systems in the South African context, particularly in urban infrastructure or public sector reform settings. • Strong working knowledge of South African regulatory frameworks and international financing safeguards standards. • Proven ability to conduct project-level screening, and environmental and social risk and impact identification. • Demonstrated experience advising on implementation of practical environmental and social risk management solutions, corrective actions and alternative financing approaches for projects that do not meet funder safeguard criteria. • Excellent writing, analysis, and stakeholder engagement skills, including the ability to translate technical requirements into practical guidance for municipalities.
Bid evaluation (total = 100 points).	<ul style="list-style-type: none"> • Relevant Experience in Safeguards and ESMS Development : Demonstrated experience in supporting public institutions to establish or enhance Environmental and Social Management Systems and apply safeguards in infrastructure projects. • Approach and Methodology : Clarity and robustness of the proposed approach to screening, compliance, ESMS development, and the identification and escalation of fiduciary risks, including potential fraud and corruption concerns, in line with National Treasury and funder protocols. • Qualifications and Technical Expertise : Academic and professional background in environmental or social safeguards, with proven ability to navigate both local and international compliance frameworks. • Understanding of Metro Governance and Funding : Knowledge of the South African municipal system, trading services reform, and the role of development finance institutions in infrastructure funding and safeguards enforcement.

Position	RST11: Environmental, Social and Fiduciary Safeguards Specialists
Level of Effort	<p>The contract will provide for:</p> <ul style="list-style-type: none"> • a maximum of 40 hours of billable effort per month, based on the agreed hourly rate. • payment will occur on submission of monthly invoices and reports.
Contract duration and review	<ul style="list-style-type: none"> • The full contract duration is for a period of 36 months from date of signing. • It is anticipated that the level of effort required by the contractor will progressively be reduced over the course of the programme, based on progress with capacity support activities.
Contract management and reporting	<ul style="list-style-type: none"> • The contractor will be contracted by the GTAC and will report to the CSP Lead on a day-to-day basis. • The contractor will be required to report monthly on progress regarding hours spent on individual tasks, outputs and deliverables.
General matters	<p>All activities undertaken in terms of this assignment shall be explicitly and prominently acknowledged as emanating from the support provided under the Cities Support Programme of the National Treasury.</p>

RST12: Procurement Specialist

Position	RST12: Procurement Specialist
Objective	Provide strategic procurement support to the National Treasury and participating metros municipalities to support and strengthen procurement execution, systems, and processes, under the Metro Trading Services Reform, including driving procurement related to the mobilisation of technical assistance and capacity-building for metros, while also advising metros on procurement planning and implementation in line with national, municipal and lender requirements.
Scope	<ul style="list-style-type: none"> • Lead and manage procurement processes for the metro trading services reform to support the mobilisation of technical assistance and capacity-building resources, in compliance with applicable public procurement frameworks and donor requirements. • Support participating metropolitan municipalities in strengthening procurement planning, execution, and oversight for trading services projects, ensuring alignment with municipal finance management frameworks and the objectives of the reform. • Review and assess metro procurement plans and systems, identifying gaps and recommending practical improvements to enhance efficiency, competitiveness, and value-for-money in the delivery of infrastructure and service contracts. • Draft, review and provide technical input into bid documentation, evaluation criteria, and contract structures, both for National Treasury-led technical assistance and, on request, for metro-managed trading services projects. • Support the development, refinement and/or application of standardised procurement tools, templates, and guidance notes to ensure consistency, compliance, and accountability across reform-related procurement activities. • Monitor procurement-related risks and advise on mitigation measures to uphold integrity and regulatory compliance. • Coordinate closely with legal, financial, and safeguards teams to ensure that procurement processes align with institutional and operational reform efforts. • Report on procurement performance, highlighting lessons learned, bottlenecks, and opportunities to streamline processes in support of reform outcomes.
Key results areas and outputs	<ol style="list-style-type: none"> 1. Procurement Execution within the Reform Support Team <ul style="list-style-type: none"> • End-to-end procurement management for technical assistance contracts. • Procurement plans, TORs, bid evaluations, and contract management records for CSP-led assignments. 2. Metro Procurement Advisory and Oversight <ul style="list-style-type: none"> • Technical reviews of metro procurement plans and systems. • Feedback on tender documentation and bid evaluation frameworks for reform-linked projects. 3. Tools and Process Improvements <ul style="list-style-type: none"> • Development/refinement of standard templates, procurement checklists, and advisory notes. • Guidelines for navigating reform-related procurement constraints and compliance. 4. Risk Management and Reporting <ul style="list-style-type: none"> • Procurement risk registers and mitigation strategies. • Reporting on procurement progress and alignment with broader reform milestones. 5. Stakeholder Coordination <ul style="list-style-type: none"> • Records of engagement with metros and intergovernmental partners on procurement.

Position	RST12: Procurement Specialist
	<ul style="list-style-type: none"> Contributions to joint problem-solving and interdepartmental task teams. <p>6. Knowledge and Learning</p> <ul style="list-style-type: none"> Case studies and briefs documenting inclusive practices and innovations. Content for awareness, or peer learning with National Treasury and metro teams.
Skills and qualifications	<ul style="list-style-type: none"> Postgraduate degree in supply chain management, public administration, law, finance, or a related field. Extensive experience in public sector procurement, including planning and executing procurements for technical assistance and infrastructure programmes in metros. Extensive experience and knowledge of South African procurement policy, legislation, and regulations (MFMA, Procurement Act, Treasury Regulations), incl. donor procurement rules where applicable. Proven ability to manage end-to-end procurement processes, incl. bid development, evaluation, and contract management for both internal and external stakeholders. Experience supporting municipalities in strengthening procurement capacity, systems, and compliance. Strong analytical and interpersonal skills, with the ability to work across technical teams and facilitate alignment with legal, financial, and programmatic requirements.
Bid evaluation (total = 100 points).	<ul style="list-style-type: none"> Relevant Procurement Advisory and Execution Experience : Demonstrated experience managing procurement for technical assistance and infrastructure programmes in South African national and local government and public entities. Technical Approach and Methodology : Clarity and relevance of the proposed approach to managing National Treasury-led procurement processes and advising metros on procurement execution under the reform. Qualifications and Expertise : Appropriate qualifications and technical capabilities in public procurement, incl. regulatory knowledge and cross-sector collaboration experience. Understanding of the Reform and Regulatory Context : Evidence of understanding of South African procurement frameworks, municipal challenges, and how to manage procurement in the context of reform-related conditions or restrictions.
Level of Effort	<p>The contract will provide for:</p> <ul style="list-style-type: none"> a maximum of 64 hours of billable effort per month, based on the agreed hourly rate. payment will occur on submission of monthly invoices and reports.
Contract duration and review	<ul style="list-style-type: none"> The full contract duration is for a period of 36 months from date of signing.. It is anticipated that the level of effort required by the contractor will progressively be reduced over the course of the programme, based on progress with capacity support activities.
Contract management and reporting	<ul style="list-style-type: none"> The contractor will be contracted by the GTAC and will report to the CSP Lead on a day-to-day basis. The contractor will be required to report monthly on progress regarding hours spent on individual tasks, outputs and deliverables.
General matters	<p>All activities undertaken in terms of this assignment shall be explicitly and prominently acknowledged as emanating from the support provided under the Cities Support Programme of the National Treasury.</p>

RST13: Gender and Inclusion Specialist

Position	RST13: Gender and Inclusion Specialist
Objective	Provide strategic support to the National Treasury and participating metro municipalities to ensure that gender equality, social inclusion, and pro-poor considerations are meaningfully addressed through the metro trading services reform.
Scope	<ul style="list-style-type: none"> • Advise the National Treasury and metros on the integration of gender and social inclusion into all aspects of the metro trading services reform, including planning, implementation, monitoring, and reporting. • Review relevant metro trading services reform documents, service delivery and infrastructure plans to identify risks of exclusion, gender-blind design, or unequal access, and propose corrective strategies. • Conduct a baseline assessment to collect and monitor gender-disaggregated and other inclusion-relevant data at various levels in metro trading services, and identify and recommendations to advance inclusive policies, programmes, and performance indicators, ensuring equitable access to trading services for women, youth, persons with disabilities, and low-income communities. • Review Employment Equity (EEP) Plans for each metro for all three metro trading services to identify barriers and steps for talent acquisition or recruitment and selection of new female staff at technical and managerial level. • Provide guidance on training and skills development of existing female staff as part of the succession plan in technical and managerial skills. • Advise on stakeholder engagement processes, ensuring meaningful participation of diverse community voices, especially from marginalised or underserved groups, including women’s groups. • Support the development or strengthening of Grievance Redress Mechanisms (GRMs) in metros to ensure inclusive, accessible, and responsive channels for resolving complaints linked to the reform, and safeguard the rights of vulnerable and marginalised groups • Contribute to training and awareness-raising for Treasury and metro teams to embed gender and inclusion principles into day-to-day planning and decision-making, including on issues of retention, promotion and hiring of women in metro trading services. • Establish a monitoring framework to collect, monitor and report on gender and inclusion related outcomes, and monitor and report on these outcomes, particularly women’s participation at technical, managerial and decision-making roles. • Support the development of learning materials, case studies, and knowledge products on inclusive urban service reform.
Key results areas and outputs	<p>1. Inclusion Strategy and Planning</p> <ul style="list-style-type: none"> • Gender and inclusion baseline assessments, action plans or frameworks aligned to metro trading services reform. • Review of Employment Equity Plans (EEPs) for metro trading services, including identification of constraints to recruitment and selection of women at technical and managerial levels. Review to also include actionable recommendations for improving talent acquisition, retention, promotion, and succession planning for women • Technical guidance on mainstreaming gender and equity in reform processes. <p>2. Programme Delivery</p> <ul style="list-style-type: none"> • Inclusive service delivery reviews and recommendations for metro infrastructure and operational plans.

Position	RST13: Gender and Inclusion Specialist
	<ul style="list-style-type: none"> • Tools for gender-responsive planning, design, implementation, stakeholder engagement, and disaggregated data tracking. • Guidance notes on training and skills development pathways for existing female staff in technical and managerial roles • Training sessions and awareness-raising workshops for National Treasury and metro teams. <p>3. Monitoring and Reporting including Grievance Redress Mechanisms (GRM)</p> <ul style="list-style-type: none"> • Gender and inclusion indicators developed and integrated into M&E systems, including indicators on women’s participation in technical, managerial, and decision-making roles. • Regular reporting on inclusion-related outcomes, risks, and lessons. • Assessment of existing grievance redress systems and development of improved GRM processes aligned to inclusion principles. • Clear protocols, referral pathways, and tools to operationalise accessible and inclusive grievance handling in metros. <p>4. Stakeholder Coordination</p> <ul style="list-style-type: none"> • Advisory inputs on inclusive stakeholder engagement strategies and participatory processes, including guidance on engaging women’s groups, youth, persons with disabilities, and low-income communities • Records of engagement with metros and intergovernmental partners on inclusion. • Contributions to metro and intergovernmental forums. <p>5. Knowledge and Learning</p> <ul style="list-style-type: none"> • Documentation of good practices for inclusive participation in urban service reform • Case studies and briefs documenting inclusive practices and innovations. • Content for awareness, or peer learning with National Treasury and metro teams.
Skills and qualifications	<ul style="list-style-type: none"> • Postgraduate degree in gender studies, social development, public policy, urban planning, or a related field. • Proven experience in gender mainstreaming and social inclusion, preferably at municipal level in infrastructure, urban development, or reform programmes. • Proven experience with South African policy and legal frameworks related to gender equality, human rights, and inclusive development. • Strong understanding of municipal finance, planning and service delivery, particularly in south Africa • Ability to conduct social analysis and apply inclusive design principles in complex, multi-stakeholder environments. • Excellent writing, facilitation, and stakeholder engagement skills, with experience producing tools and resources for government audiences. • Experience working with municipalities, national departments, inter-governmental systems or donor-funded programmes in South Africa.
Bid evaluation (total = 100 points).	<ul style="list-style-type: none"> • Relevant Gender and Inclusion Experience : Demonstrated experience in applying gender and social inclusion principles in infrastructure or public sector reforms. • Approach and Methodology : Clarity and feasibility of the proposed approach to mainstreaming gender and inclusion, incl. the design or enhancement of grievance redress mechanisms that serve all segments of society, especially marginalised groups. • Qualifications and Expertise : Relevant academic qualifications and technical experience in gender, inclusion, and urban development.

Position	RST13: Gender and Inclusion Specialist
	<ul style="list-style-type: none"> • Understanding of the Public Sector and Reform Context : Evidence of understanding of South African policy frameworks, urban governance, and the operational realities of local government.
Level of Effort	<p>The contract will provide for:</p> <ul style="list-style-type: none"> • a maximum of 40 hours of billable effort per month, based on the agreed hourly rate. • payment will occur on submission of monthly invoices and reports.
Contract duration and review	<ul style="list-style-type: none"> • The full contract duration is for a period of 36 months from date of signing. • It is anticipated that the level of effort required by the contractor will progressively be reduced over the course of the programme, based on progress with capacity support activities.
Contract management and reporting	<ul style="list-style-type: none"> • The contractor will be contracted by the GTAC and will report to the CSP Lead on a day-to-day basis. • The contractor will be required to report monthly on progress regarding hours spent on individual tasks, outputs and deliverables.
General matters	<p>All activities undertaken in terms of this assignment shall be explicitly and prominently acknowledged as emanating from the support provided under the Cities Support Programme of the National Treasury.</p>

RST14: Finance, Operations and Admin Coordinator

Position	RST14: Finance, Operations and Admin Coordinator
Objective	To support the implementation of the MTSR through financial management, reporting, operational systems and coordination, internal organisation, and administration
Scope	<ul style="list-style-type: none"> • Serve as the operational hub linking finance, procurement, and programme management teams to ensure information flows, deadlines, and processes are aligned across all reform workstreams. • Develop, implement, manage, and monitor systems and procedures to ensure that the MTSR manages its budget and financial systems efficiently, effectively, and transparently in accordance with legal frameworks and agreed timeframes. • Coordinate day-to-day programme operations, including financial tracking, procurement administration, travel/logistics planning, and document management for the reform team. • Monitor budgets and expenditures against approved allocations, prepare financial summaries, and flag potential variances for management action. • Administer contracts and agreements for technical assistance, service providers, and consultants, ensuring adherence to procurement and compliance requirements. • Support procurement processes by supporting preparation of terms of reference, maintaining records, and liaising with supply chain management for timely procurement of services. • Provide operational and event coordination support for reform-related workshops, learning exchanges, and stakeholder engagements. • Maintain programme filing systems and knowledge archives, ensuring secure and accessible storage of financial, contractual, and operational records. • Prepare regular operational and financial status reports for the reform programme management team and oversight committees • Internal Reporting: manage and consolidate the system of internal monthly, quarterly, and annual reporting to ensure that financial and narrative internal reports are submitted timeously and in full. • Team operations management, including support to ensure human resources are recruited and managed effectively, ensure internal coordination of agreed programme activities in accordance with agreed schedules, and provide secretariat support for team management meetings, incl establishing the meeting schedule, agendas, minutes, and tracking follow up actions. <p>Mentoring and support</p> <ul style="list-style-type: none"> • Develop, coordinate, and oversee the implementation of capacity support and mentoring programmes for metro and national departmental staff in line with programme objectives. <p>Other and General Support</p> <ul style="list-style-type: none"> • Ensure linkage and alignment with CSP. • Support to activities and processes that enhance the work of the CSP
Key results areas and outputs	<p>1. Cross-Team Coordination</p> <ul style="list-style-type: none"> • Consolidated operational schedules and reporting templates used across finance, procurement, and programme management teams. • Documented coordination protocols for information sharing and task tracking. <p>2. Financial Management</p> <ul style="list-style-type: none"> • Financial management and reporting: drafting of annual programme budget and preparation of quarterly and annual consolidated financial reports, monthly monitoring of expenditure relative to programme and project budgets.

Position	RST14: Finance, Operations and Admin Coordinator
	<ul style="list-style-type: none"> • Monthly expenditure tracking reports and variance analyses. • Accurate and timely financial inputs for quarterly and annual reporting. <p>3. Contract and Procurement Administration</p> <ul style="list-style-type: none"> • Contract registers updated with key milestones, deliverables, and payment schedules. • Procurement records and requisitions processed in compliance with government and programme requirements. • Contract management of MTSR team members, including approvals and payments. <p>4. Operations Coordination</p> <ul style="list-style-type: none"> • Event, travel, and logistics plans delivered on time and within budget. • Secure and well-maintained records management system for programme documents. <p>5. Programme Support Reporting</p> <ul style="list-style-type: none"> • Review and monitoring of MTSR workplans. • Operational dashboards and summary updates prepared for programme leadership. <p>6. Development and management of annual mentoring support plan</p> <ul style="list-style-type: none"> • Develop and manage mentoring and capacity support plans for MTSR team.
Skills and qualifications	<ul style="list-style-type: none"> • Diploma or degree in finance, business administration, public administration, or a related field from a recognized tertiary institution. • Proven experience in public sector administration in South Africa, incl coordinating finance, procurement, and operations functions within government, donor-funded, or large programme environments. • Familiarity with public sector financial and procurement procedures in South Africa (including PFMA/MFMA regulations). • Excellent project management, logistical and administrative skills, with a track record of successfully delivering public sector events. • Proficiency in financial management systems, MS Office, project and document management tools including a functional knowledge of common corporate software packages and cloud computing. • Exceptional organisational and multitasking skills, with demonstrated ability to manage cross-team workflows and deadlines. • Excellent communication and interpersonal skills for coordinating between technical, operational, and financial teams.
Bid evaluation. (total = 100 points)	<ul style="list-style-type: none"> • Relevant Cross-Functional Coordination Experience : Demonstrated experience in integrating finance, procurement, and operational functions to support complex programme delivery in the public sector. • Approach and Methodology : Quality and practicality of the proposed approach to acting as the operational hub across multiple reform workstreams, ensuring compliance, efficiency, and timely delivery. • Qualifications and Technical Competence: Academic background and technical skills in finance, procurement, and programme operations relevant to a large-scale reform environment. • Understanding of Public Sector Context Knowledge of South African public finance management, procurement frameworks, and operational requirements for intergovernmental reform programmes.
Level of Effort	<p>The contract will provide for:</p> <ul style="list-style-type: none"> • a maximum of 80 hours of billable effort per month, based on the agreed hourly rate.

Position	RST14: Finance, Operations and Admin Coordinator
	<ul style="list-style-type: none"> • payment will occur on submission of monthly invoices and reports.
Contract duration and review	<ul style="list-style-type: none"> • The full contract duration is for a period of 36 months from date of signing. • It is anticipated that the level of effort required by the contractor will progressively be reduced over the course of the programme, based on progress with capacity support activities.
Contract management and reporting	<ul style="list-style-type: none"> • The contractor will be contracted by the GTAC and will report to the CSP Lead on a day-to-day basis. • The contractor will be required to report monthly on progress regarding hours spent on individual tasks, outputs and deliverables.
General matters	All activities undertaken in terms of this assignment shall be explicitly and prominently acknowledged as emanating from the support provided under the Cities Support Programme of the National Treasury

4. LOGISTICS AND SCHEDULE OF THE ASSIGNMENT

4.1 LOGISTICAL SUPPORT

The service provider will be responsible for providing their own laptops, cell phones and transportation for the duration of this contract. All disbursement claims incurred as part of this contract will be payable by the National Treasury in line with the National Treasury's existing policy.

4.2 CONTRACT MANAGEMENT AND REPORTING

All service providers will be contracted by the GTAC who will be responsible for the contract administration.

The manager in the National Treasury responsible for delivery against outputs will be the Chief Director: Neighbourhood Development Partnership Programme (NDPP).

The Reform Support Team will report directly to the Climate Resilience and Sustainable Services Lead in the Cities Support Programme on a daily basis. Unless by prior arrangements, formal reporting shall be done in a form of a meeting which may sometimes happen via a governance structure.

4.3 PROJECT DURATION

The contract duration is from date of signature for a duration of 3 years, with a possible renewal for two (2) years depending on the pace of institutionalisation within National Treasury and performance of the contracted team with regards to institutionalisation.

5. REMUNERATION

Service providers will be remunerated on a flat rate of a maximum of R1 200.00 (excl VAT) for the duration of the contract based on time and cost for work done at the hourly rate set out in the agreement. Annual increases will be effected at an inflation rate as approved by the National Treasury upon the anniversary of the contract. See attached excel - annexure A

6. SUBMISSION REQUIREMENTS

The following are the minimum requirements which must be observed by service providers. Submissions that do not meet these minimum requirements will be disqualified. The requirements are:

- a) Curriculum vitae must be submitted for individuals.
- b) Work experience referenced on the curriculum vitae must be accompanied by relevant contactable referees (at least one reference letter not older than 5 years - evidence based).
- c) Applications not meeting the minimum experience and qualifications will not be considered.

7. RISKS AND ASSUMPTIONS

The following have been identified as risks and assumptions:

- Lag time in procuring a Framework Provider to assist in sourcing of suitable candidates.
- Availability of the assigned government officials as part of the institutionalisation of the programme within National Treasury.

8. EVALUATION PROCESS AND METHODOLOGY

This RFP will be evaluated in terms of the 80/20 preference point system prescribed by the Preferential Procurement Regulations 2022.

GTAC has set minimum standards that bidders must meet to be selected as successful bidders.

The successful bidder will be awarded the contract for the **above** duration of the service requirements and will be selected based on the following three-phase process:

8.1 EVALUATION PHASES/METHODOLOGY

Table 1: Evaluation Phases

Evaluation Stage	Description
Phase 1	<p>Stage 1A: Administrative Compliance: Non-Disqualifying A bidder is required to submit the administrative compliance documents as referred to in paragraph 8.1.1.</p> <p>Stage 1B: Mandatory Compliance – Disqualification/ Pre-Qualification Failure to submit any of the required mandatory documents will lead to disqualification. Refer to paragraph 8.2.1.</p>
Phase 2	<p>Technical Evaluation: Desktop Evaluation Bidders must submit information as per the Bid Submission Requirements. The submitted technical proposal must respond to the Technical Evaluation criteria cited in these Terms of Reference.</p> <p>The Technical proposal will be evaluated out of 100% with a Threshold of 70%. Only bidders who meet the threshold will be considered for the Price and Specific Goals evaluation.</p>
Phase 3	<p>Price and Specific Goals Preference points in the 80/20 formula will be awarded to bidders for attaining a score for Specific goals as indicated in Table 3. Bidders must provide the required information for evaluation purposes.</p>

It should be noted that the stages are considered to be separate processes. These three phases are mutually exclusive and will be treated as such in the appraisal.

8.1.1 STAGE 1A: ADMINISTRATIVE COMPLIANCE (NON-DISQUALIFICATION)

During this phase, bid documents will be reviewed to determine compliance with tax matters and the Central Supplier Database (CSD) at the closing date and time of the bid. Bidders must submit all returnable documents as outlined in the table below using the designated electronic e-procurement system

Table 2: Bid requirements compilation and submission:

Document to be submitted	Requirement
SBD 1- Invitation to Bid	Complete the supplied pro forma document on the e-procurement system.
Central Supplier Database (CSD) Registration Report , or CSD registration number and Valid Tax Compliance Status Verification.	Bidders must be registered on the Central Database System (CSD) at the closing date and time of the bid. NB: The bidder must submit, in the case of a Joint Venture, Consortium, Trust, or Partnership a Valid Tax Compliance Status Verification.
SBD 4 - Bidder’s Disclosure (Refer to note below)	Complete the supplied pro forma document on the e-procurement system.
<p>Note:</p> <p>Bidders must complete the SBD 4 document as provided on e-procurement. A bid may be disqualified if this disclosure is found not to be true and complete in every respect. The following definitions should be considered when completing the form:</p> <ul style="list-style-type: none"> - “Person” means a bidder or supplier or shareholder, director, trustee, partner, or member of a bidder or supplier having the controlling interest in the bidder or supplier. - “State” means a national or provincial department, a national or provincial public entity or constitutional institution, a municipality or municipal entity, a provincial legislature or parliament 	
Document to be submitted	Requirement
SBD 6.1 - Preferential Point Claim form in terms of the Preferential Procurement Regulation (PPR) 2022.	<p>Complete the supplied pro forma document on e-procurement system i.e SBD 6.1 and Specific Goals tab as provided on the e-procurement system.</p> <p>Failure to complete the SBD 6.1 will result in the bidder forfeiting points for specific goals.</p>

8.2 TAX CLEARANCE STATUS

A valid tax PIN / Central Supplier Database (CSD) number must be provided for purposes of verifying that the tax matters of the bidder are in order. Bidder’s tax matters must be compliant at the time of award. In the case where a bidder’s tax matters are non-compliant, a bidder will be given a maximum of seven (7) working days to remedy the tax matters. Failure to remedy this will invalidate the bid.

No award shall be made to a bidder whose tax affairs are not in order.

GTAC reserves the right to withdraw an award made or cancel a contract concluded with a successful bidder if it is established that such bidder was not tax compliant at the time of the award.

GTAC further reserves the right to cancel a contract with a successful bidder if such bidder does not remain tax compliant for the full term of the contract.

8.2.1 STAGE 1B: MANDATORY COMPLIANCE (DISQUALIFICATION)

Bidders must submit a responsive proposal in accordance with these terms of reference and below the minimum prequalification. Failure to adhere to any of these requirements will result in disqualification:

- a. Bidders must be registered on the Central Supplier Database (CSD) on the closing date of the Request for Quotation (RFP).
- b. Submission of a technical proposal is required. A bidder is required to submit no more than one (1) CV per specialist required. If a bidder submits more than 1 CV, only the first CV (using numbering ordering) shall be considered for evaluation.
- c. Submission of a price/financial proposal is required as per SBD 3.3, and must be completed as indicated in the e-procurement portal
- d. Any bidder representative (Director/Shareholder/Proposed Resource) who is employed by the state will not be considered. i.e., if a bidder representative is in the employment of the state, such a bid proposal will not be considered.

8.2.2 PHASE 2: DESKTOP EVALUATION

- a. Bids will be evaluated strictly in accordance with the bid evaluation criteria stipulated in this ToR.
- b. In a case where there is a difference between the contents of this ToR and the e-procurement system, the ToR takes precedence.
- c. Proof of Qualifications: Bidders must upload qualification certificates as well as all required certificates. Certified copies will be requested in the event that the bid is successful and before an agreement can be concluded.
- d. Please note that a Certificate of Membership shall not be deemed as proof of educational qualification (Education qualifications refer to certifications issued by an institution of higher learning, e.g., certificate, diploma, degree, etc.)
- e. Non-submission of qualifications will lead to a score of zero for the qualifications technical criterion.
- f. All international qualifications must be accompanied by South African

Qualifications Authority (SAQA) Accreditation.

- g. Non-submission of SAQA confirmation will lead to a score of zero for the qualification's technical criterion.
- h. A maximum of one (1) CV will be evaluated per specialist. If more than one CV is submitted per specialist, the first CV will be evaluated.

8.2.3 SCORING CRITERIA

- a. Relevant Experience in Safeguards and ESMS Development (40%): Demonstrated experience in supporting public institutions to establish or enhance Environmental and Social Management Systems and apply safeguards in infrastructure projects.
- b. Approach and Methodology (25%): Clarity and robustness of the proposed approach to screening, compliance, ESMS development, and the identification and escalation of fiduciary risks, including potential fraud and corruption concerns, in line with National Treasury and funder protocols.
- c. Qualifications and Technical Expertise (20%): Academic and professional background in environmental or social safeguards, with proven ability to navigate both local and international compliance frameworks.
- d. Understanding of Metro Governance and Funding (15%): Knowledge of the South African municipal system, trading services reform, and the role of development finance institutions in infrastructure funding and safeguards enforcement.

The CV template should clearly indicate the Approach and Methodology (as requested criteria 2) as well as Understanding of the specialised skill (as Criteria 4)

RST11: Environmental, Social and Fiduciary Safeguards Specialists

No	Evaluation Criteria: RST11: Environmental, Social and Fiduciary Safeguards Specialists	Weight	Scoring Criteria
1.	<p>Relevant Experience in Safeguards and ESMS Development (40%): Demonstrated experience in supporting public institutions to establish or enhance Environmental and Social Management Systems and apply safeguards in infrastructure projects. Provide a list of experience, clearly stating start and end date and the role played.</p>	40 %	<p>5 = >10 years 4 = 9 - 10 years 3 = 6-8 years 2 = 2-5 years 1 = < 2 year 0 = No relevant experience</p>
2.	<p>Approach and Methodology (25%): Bidder to provide a short approach and methodology plan on how to establish or enhance Environmental and Social Management Systems and apply safeguards in infrastructure projects The methodology should provide a clear and robust approach to screening, compliance, ESMS development, and the identification and escalation of risks,</p>	25 %	<p>5 = Excellent Highly detailed, coherent, and robust approach. Demonstrates strong expertise in ESMS development and fiduciary risk identification/escalation. Includes practical tools, workflows, and safeguards against fraud/corruption. Fully aligned with National Treasury and funder protocols, with clear added value/innovation 4 = Good Clear, structured, and practical approach. Demonstrates solid understanding of ESMS and fiduciary risk management, including fraud and corruption. Well aligned with National Treasury and funder protocols. Minor gaps only. 3 = Average / Satisfactory Adequate and generally clear approach. Covers key elements (screening, compliance, ESMS, risk escalation) but lacks depth or innovation. Some alignment with National Treasury and funder requirements. 2 = Below Average Basic approach provided but lacks detail and coherence. Weak understanding of ESMS and fiduciary risk processes. Limited reference to fraud/corruption risk handling. Minimal alignment with required protocols. 1 = Poor Very limited or unclear approach. Major gaps in screening, compliance, ESMS, and risk management. No alignment with National Treasury or funder protocols</p>

			0 = Non-responsive No approach provided or completely irrelevant to the requirements.
3.	<p>Qualifications (20%): Academic and professional background in environmental or social safeguards, including qualifications in a relevant field, namely BSc Environmental Science</p> <ul style="list-style-type: none"> • BSc Environmental Management\ • BSc Geography and Environmental Management • BSc Ecology / Conservation • BSc Earth Sciences • BA Environmental Management • BSc Climate Change / Sustainability • B Eng – Civil • B SC – Geohydrologist • B-Degree in Sociology or, Development Studies • B Comm, specialising in governance 	20 %	<p>5 = Honours/Post-Graduate Diploma (NQF 8) + further Certificate</p> <p>4 = Honours/ Post-Graduate Diploma (NQF 8)</p> <p>3= Bachelors Degree (NQF 7)</p> <p>2 = National Diploma (NQF 6)</p> <p>1 = Higher certificate (NQF 5) / Matric/National Senior Certificate (NQF 4)</p> <p>0 = non-submission of qualifications or qualifications are not in the relevant area as specified. Foreign qualifications without SAQA accreditation will not be considered for evaluation, and a score of 0 will be awarded.</p>
4.	<p>Understanding of Metro Governance and Funding (15%): Bidder to clearly state exposure to:</p> <ul style="list-style-type: none"> • the SA municipal system, start and end date and role. • Demonstrated knowledge of the South African municipal system, trading services reform, and • the role of development finance institutions in infrastructure funding and safeguards enforcement, 	15%	<p>5 = Excellent - more than 5 years relevant experience in all three listed components</p> <p>4 = Very Good – 3 – 5 years experience in all three listed components</p> <p>3 = Good – less than 3 years’ experience in the listed components OR any number of years’ experience in only 2 components</p> <p>2 = Average - less than 1 year experience in the listed components OR experience in 2 or less components</p> <p>1 = Poor – no relevant experience.</p> <p>0 – Non-responsive</p>
	TOTAL TECHNICAL SCORE	100	
	MINIMUM THRESHOLD	70%	

RST12: Procurement Specialist

No	Evaluation Criteria: RST12: Procurement Specialist	Weight	Scoring Criteria
1.	<p>Relevant Procurement Advisory and Execution Experience (40%): Demonstrated experience managing procurement for technical assistance and infrastructure programmes in South African national and local government and public entities. Provide a list of experience, clearly stating start and end date and the role played.</p>	40%	<p>5 = >10 years 4 = 9 - 10 years 3 = 6-8 years 2 = 2-5 years 1 = < 2 year 0 = No relevant experience</p>
2.	<p>Technical Approach and Methodology (25%): Bidder to provide a short approach and methodology plan on how to manage National Treasury-led procurement processes and advising metros on procurement execution under the reform. BIDDER TO CLEARLY SHOW:</p> <ul style="list-style-type: none"> • no of years' experience in procurement • national government experience • local government experience • nature of procurement – to demonstrate the complexity of the terms of references. 	25%	<p>5 = more than 10 years' experience in either national or local government procurement 4 = 6-10 years' experience in either national or local government procurement 3= 3-5 years' experience either national or local government procurement 2 = Less than 3 years OR no national or local government procurement experience 1 = limited experience 0 = No relevant experience</p>
3.	<p>Qualifications (20%): Appropriate qualifications in public procurement, incl. regulatory knowledge and cross-sector collaboration experience. Typical qualifications would include: B Com supply chain management Any B Com degree Relevant logistics degree</p>	20%	<p>5 = Honours or higher qualification as stipulated 4 = Degree or higher qualification plus a further certificate in Supply chain management 3 = Relevant B- Degree with no specialisation certificate 2 = national diploma with a certificate in supply chain management 1= National Diploma in SCM 0 = Matric or no relevant qualification</p>
4.	<p>Understanding of the Reform and Regulatory Context (15%): Bidder to provide:</p> <ul style="list-style-type: none"> • Evidence of understanding of South African procurement frameworks, municipal challenges, and 	15%	<p>5 = Excellent - more than 5 years relevant experience all three listed components 4 = Very Good – 3 – 5 years' experience in all three listed components 3 = Good – less than 3 years' experience in the listed</p>

	<ul style="list-style-type: none"> • how to manage procurement in the context of reform-related conditions or restrictions • provide innovative solutions for procurement challenges that might arise 		<p>components OR any number of years' experience in only 2 components</p> <p>2 = Average - less than 1 year experience in the listed components OR experience in 2 or less components</p> <p>1 = Poor – no relevant experience</p> <p>0 = No relevant experience.</p>
	TOTAL TECHNICAL SCORE	100	
	MINIMUM THRESHOLD	70%	

RST13: Gender and Inclusion Specialist

No	Evaluation Criteria: RST13: Gender and Inclusion Specialist	Weight	Scoring Criteria
1.	<p>Relevant Gender and Inclusion Experience (40%): Demonstrated experience in applying gender and social inclusion principles in infrastructure or public sector reforms. Provide a list of experience, clearly stating start and end date and the role played</p>	40%	<p>5 = >10 years experience in applying gender and social inclusion principles 4 = 8 – 10 years 3 = 5-7 years 2 = 2-5 years 1 = < 2 year 0 = No relevant experience</p>
2.	<p>Approach and Methodology (25%): Bidder to provide a short approach and methodology plan on how to establish or enhance mainstreaming of gender and inclusion, incl. the design or enhancement of grievance redress mechanisms that serve all segments of society, especially marginalised groups. Points will be allocated to:</p> <ul style="list-style-type: none"> • practical experience in national government • practical experience in local government • understanding / exposure to international procurement practises (world bank and others) • policy / procedure notes written on gender and social inclusion 	25%	<p>5 = Excellent - clear approach and methodology, with experience in all four listed criteria 4 = Very Good - clear approach and methodology, with experience in at least three listed criteria 3 = Good - standard approach. Lacks innovation and experience in 3 or less of the listed criteria 2 = Average - limited reference and experience and understanding of the approach in driving social and gender inclusion 1 = Poor - poor submission, less than two criteria listed 0 = Non-responsive No approach provided or completely irrelevant to the requirements.</p>
3.	<p>Qualifications (20%): Relevant academic qualifications in gender, inclusion, and urban development, namely: Human Resources Management Industrial and Organisational Psychology, Sociology or related social studies.</p>	20%	<p>5 = Masters 4 = Honours 3 = Degree 2 = National Diploma 1 = Matric or no relevant qualification</p>
4.	<p>Understanding of the Reform and Regulatory Context (15%): Bidder to provide :</p> <ul style="list-style-type: none"> • Evidence of understanding of South African gender and inclusion focussed policies • Challenges being presented in local municipal, and how to influence and manage local government to comply and include this in their trading services. 	15%	<p>5 = Excellent submission, clearly stating existing challenges, the policy environment and innovative solutions to drive this inclusion and monitor the implementation thereof 4 = Very Good submission, clearly stating existing challenges, the policy environment and innovative solutions to drive this inclusion and monitor the implementation thereof. Local</p>

			<p>government exposure is limited to less than 5 years.</p> <p>3 = Good submission, clearly stating existing challenges, the policy environment. Limited innovation and limited monitoring of the implementation thereof</p> <p>2 = Average – generic submission, no monitoring experience, limited LG exposure</p> <p>1 = Poor – submission will not address the requirements to mainstream this in the trading services environment in LG ; not clearly articulated ; no clear path or solution</p> <p>0 = No relevant experience.</p>
	TOTAL SCORE	100	
	THRESHOLD	70%	

RST14: Finance, Operations and Admin Coordinator

No	Evaluation Criteria: RST14: Finance, Operations and Admin Coordinator	Weight	Scoring Criteria
1.	<p>Relevant Cross-Functional Coordination Experience (40%): Demonstrated experience in integrating finance, procurement, and operational functions to support complex programme delivery in the public sector. Provide a list of experience, clearly stating start and end date and the role played</p>	40%	<p>5 = >15 years 4 = 10-15 years 3 = 5-10 years 2 = 2-5 years 1 = < 2 year 0 = No relevant experience</p>
2.	<p>Approach and Methodology (25%): Bidder to provide a short approach and methodology on how to manage the practicality of the proposed approach to acting as the operational hub across multiple reform workstreams, ensuring compliance, efficiency, and timely delivery.</p>	25%	<p>5 = Excellent methodology, clearly showing integration between procurements, operations and finance. Controls and risks addressed well. 4 = Very Good methodology, clearly showing integration between procurements, operations and finance. Controls and risks addressed well., but lacks innovation and automation 3 = Good methodology, showing limited understanding of the integration between procurements, operations and finance. Controls and risks generic. 2 = Average - submission treated as stand alone items and no integration and limited controls discussed 1 = Poor – submission is sub standard and does not show and understanding of the integration of all three functions. 0 = Non-responsive No approach provided or completely irrelevant to the requirements.</p>
3.	<p>Qualifications (20%): qualifications in any B-Degree in Commerce</p>	20%	<p>5 = Masters 4 = Honours 3= Degree 2 = National Diploma 1 = Matric or no relevant qualification</p>

4.	<p>Understanding of Public Sector Context (15%): Knowledge of South African public finance management, procurement frameworks, and operational requirements for intergovernmental reform programmes. Evidence of:</p> <ul style="list-style-type: none"> • Procurements facilitated and service provider management • Financial management and controls • Exposure to the fiscal transfers between spheres of government • Managing the operations of a government -led programme 	15%	<p>5 = Excellent – demonstrated experience in all 4 criteria 4 = Very Good demonstrated experience in 3 listed criteria 3 = Good demonstrated experience in 2 listed criteria 2 = Average demonstrated experience in one of the criteria 1 = Poor, limited experience and exposure 0 = No relevant experience.</p>
	TOTAL TECHNICAL SCORE	100	
	MINIMUM THRESHOLD	70%	

Only bidders that meet the 70% threshold will be considered for the Price and Specific Goals evaluation in terms of the Preferential Procurement Regulation (PPR) 2022.

Bidder to note that only bidders where **ALL four** specialists meet the minimum threshold 70% or more, will be considered for price and specific goal of evaluation. (partial teams are not acceptable and all specialist will be evaluated independently).

8.2.4 PHASE 3: PRICE AND SPECIFIC GOALS EVALUATION

- a. The Preferential Procurement Evaluation will be based on the 80/20 principle. The applicable formula (80/20) will be utilised to evaluate the bid, of which eighty (80) points are allocated for the price as allocated in the enclosed form SBD 6.1. which must be completed, and the remaining twenty (20) points are allocated for the specific goals as indicated in Table 3 below.
- b. Submission of a price proposal is required in the proforma format as provided and indicated on the e-procurement system. (SBD 3.3). Bidders need to provide the cost per output, inclusive of VAT.
- c. GTAC reserves the right to negotiate the price offer or rates with the recommended bidder(s).

Table 3: Price and Specific Goals Evaluation Criteria

Number of points allocated (80/20 system)	
Price	80
The specific goals allocated points in terms of this tender	20
Above 30% ownership for Historically Disadvantaged Individuals who had no franchise in national elections before the 1983 or 1993 Constitutions.	10
Women percentage of ownership: 30% and above	10
Total Points	100

The CSD report shall be used as evidence to confirm/award points for specific goals.

It is the responsibility of the bidding entity to ensure that the information on the CSD is updated.

Table 4: Definitions

Terminology	Definition
Black People	As per the Broad-Based Black Economic Empowerment Act 53 of 2003 as Amended by Act No 46 of 2013 “Black People” is a generic term which means Africans, Coloureds and Indians – (a) who are citizens of the Republic of South Africa by birth or descent; or (b) who became citizens of the Republic of South Africa by naturalisation before 27 April 1994; or II. on or after 27 April 1994 and who would have been entitled to acquire citizenship by naturalisation prior to that date.
“Specific Goals”	means specific goals as contemplated in section 2(1)(d) of the Act, which may include contracting with persons, or categories of persons, historically disadvantaged by unfair discrimination on the basis of race, gender and disability, including the implementation of programmes of the Reconstruction and Development Programme as published in <i>Government Gazette</i> No. 16085 dated 23 November 1994;

<p>Historically Disadvantaged Individual (HDI)</p>	<p>means a South African citizen:</p> <ol style="list-style-type: none"> 1. who, due to the apartheid policy that had been in place, had no franchise in national elections prior to the introduction of the Constitution of the Republic of South Africa, 1983 (Act No 110 of 1983) or the Constitution of the Republic of South Africa, 1993, (Act No 200 of 1993) (“the interim Constitution); and/or 2. who is a female; and/or 3. who has a disability. <p>provided that a person who obtained South African citizenship on or after the coming into effect of the Interim Constitution is deemed not to be an HDI;</p>
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9. SKILLS TRANSFER

The appointed Service Providers will be assigned to a government official with whom to transfer skills as a contractual obligation as part of institutionalisation of the programme.

Knowledge transfer should occur in line with the results-based framework established for CSP as well as in the context of the prioritised work components.

10. MONITORING AND EVALUATION

The monitoring and evaluation of the proposed coordination structure located within the Intergovernmental Relations Division will be performed continuously from the inception of the contracts. Performance that is below the expectation as per the workplan will be noted and the service provider will be expected to undertake corrective measures within the set time which will be agreed between the Climate Resilience and Sustainable Services Component Lead and the Service Provider.

11. FINANCIAL IMPLICATIONS

As stated in the submission requirements, an hourly professional fee inclusive of VAT (if applicable), not exceeding R1200.00 rand per hour (one thousand two hundred Rand) should be provided in SBD 3.3. Bidders to complete the costing template that indicates level of effort for every individual required.

12. CONTRACTING AUTHORITY

The Contracting Authority will be the Government Technical Advisory Centre (GTAC).

13. OTHER BID CONDITIONS

Prior to the appointment, the recommended service provider may be required to submit additional supporting documentation.

GTAC reserves the right to negotiate the final offer with the recommended bidder before the award.

GTAC reserves the right to terminate the Agreement/award or temporarily defer the provisioning of the Services, or any part thereof, at any phase with immediate effect on written notice to the Service Provider, should the GTAC in its sole and absolute discretion, decide not to proceed with the Services.

14. BID VALIDITY PERIOD

The RFP will be valid for ninety (90) days from the closing date of the RFP.

15. LEGAL IMPLICATIONS

The successful service provider must be prepared to enter into a service-level agreement with GTAC.

16. CLARIFICATIONS

Requests for clarification must be made in writing by e-mail. Telephonic enquiries for clarification will not be accepted.

Requests for clarification will be accepted by GTAC as specified in the bid document. The tender reference must be included in the subject line of the email.

17. COMMUNICATION

GTAC's Professional Services Procurement (PSP) unit will only communicate with bidders by email where bid clarity is sought, to obtain information or to extend the validity period. For any enquiries, email: rfp@gtac.go.za. The submission reference must be included in the subject line of the email.

GTAC will only respond to email communication during business hours.

Alternatively, contact the e-procurement portal support desk at:

<https://vendorportal.gtac.gov.za/Contact>.

Any communication by the bidder (either by facsimile, letter, electronic mail or any other form of correspondence) to any government official, representative, or a person acting in an advisory capacity for GTAC in respect of this bid between the closing date and the award of the bid is prohibited.

18. COUNTER CONDITIONS

Bidders' attention is drawn to the fact that amendments to any of the Information to bid by bidders will result in invalidation of such bids.

19. PROHIBITION OF RESTRICTIVE PRACTICES

In terms of section 4(1) of the Competition Act No. 89 of 1998, as amended, an agreement between, or concerted practice by, firms, or a decision by an association of firms, is prohibited if it is between parties in a horizontal relationship and if a bidder(s) is/ are or a contractor(s) was/were involved in:

- a. Directly or indirectly fixing a purchase or selling price or any other trading condition.
- b. Dividing markets by allocating customers, suppliers, territories or specific types of goods or services; or
- c. Collusive bidding.
- d. If a bidder(s) or contractor(s), in the judgment of the purchaser, has/have engaged in any of the restrictive practices referred to above, the purchaser may, without prejudice to any other remedy provided for, invalidate the bid(s) for such item(s) offered or terminate the contract in whole or in part and refer the matter to the Competition Commission for investigation and possible imposition of administrative penalties as contemplated in the Competition Act No. 89 of 1998.

20. BENEFICIAL OWNERSHIP

The bidder/s are required to provide the information below for transparency.

- a. A beneficial owner of a company is an individual who, directly or indirectly, ultimately owns that company or exercises effective control over that company.
- b. Companies are required to keep a register of their beneficial owners and to provide this information to the Companies and Intellectual Property Commission (CIPC). The CIPC maintains a central register of beneficial ownership information.
- c. The beneficial ownership regime in South Africa is intended to improve transparency and accountability in the corporate sector. It is also intended to help prevent money laundering and terrorist financing.
- d. Companies are required to keep a register of their beneficial owners and must disclose in their bids the following information, as provided for in their register for the information of each beneficial owner:
 - Name
 - Date of birth

- Identity number or passport number
- Residential address
- Occupation
- Nature and extent of control over the company

21. SUBMISSION DETAILS

To respond to this tender, bidders are required to register on the GTAC e-procurement system, using the following link: <https://vendorportal.gtac.gov.za/>

The registration process involves the following steps:

- Register as a portal user. This is the process of creating a user account on the vendor portal/e-procurement system. This will allow the user to view and respond to tenders.
- Capture the supplier details. Registering the company details allows the bidder to enter information and upload documents.

To respond to this tender:

- Log in to the portal <https://vendorportal.gtac.gov.za/>
- Navigate to the tender menu.
- Select “Formal” and click on “Current”.
- A list of available tenders/RFQ will be available, and the bidder to select the tender number (e.g. TENxxxxx) to start the submission process.

Detailed instructions on how to register on the e-procurement system are available at: (<https://docs.corelab.co.za/Home/ViewContent?productid=1§ionid=2&contentid=1165>)

The capturing process is in the form of a wizard, with the system guiding you through each step. Once all the required information is completed, remember to submit your bid. Only submitted bids will be eligible for the award.

NB: Only electronic submission of bids on the GTAC e-procurement system is allowed. Do not submit hard copy bids to GTAC, as these will not be considered.

NB: Submissions received after the closing date and time will not be accepted.

For any enquiries, email: rfp@gtac.gov.za or contact the vendor support desk at: <https://vendorportal.gtac.gov.za/Contact>.

22. CONTACT DETAILS

Professional Services Procurement, 3rd Floor
at GTAC: room GL03.44 Private Bag X 115,
Pretoria, 0001

Physical address: GTAC, 40 Madiba Street, Pretoria.0001 For any
enquiries, email: psp@gtac.gov.za