

TERMS OF REFERENCE

FOR THE ESTABLISHMENT OF A TECHNICAL ADVISORY HUB (GTAC) PANEL OF TECHNICAL ADVISORS FOR A PERIOD OF FIVE (5) YEARS

Tender reference	GTAC: TEN0000000043
Tender title	Establishment of a panel of technical advisors
Contracting Authority	Government Technical Advisory Centre (GTAC)
Accounting Officer	Ronette Engela Accounting Officer: GTAC
Purpose	GTAC seeks to establish a panel of experienced technical advisors who will support the mandate of its Technical Advisory Hub
Non-Compulsory Briefing Session	A non-compulsory briefing session will be held virtually via Microsoft (MS) Teams on (16 July 2025 at 10:00). Please see the link on the tender advert page.

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1 BACKGROUND INFORMATION

1.1 Introduction

GTAC is a government entity promulgated through a Legal Notice (35194) published in the Government Gazette on 30 March 2012. It is an agency of the National Treasury, established to assist Organs of State in building their capacity for efficient, effective and transparent financial management.

The functions of GTAC are:

- To render technical consulting services to Centre of Government Departments and Organs of State;
- To provide specialised procurement support for high-impact government initiatives;
- To render advice on the feasibility of infrastructure projects;
- To provide knowledge management for projects undertaken; and
- Anything ancillary to the functions listed above.

GTAC's Founding Notice indicates that it provides services to its clients, through agreements with the National Treasury, centre-of-government departments and organs of state¹.

GTAC implements its mandate through a client-focused and predominantly project-based approach and collaborates with partners inside and outside government in the development and delivery of its services. More information on the organisation and its work may be found on the GTAC website (www.gtac.gov.za).

During the course of Financial Year 2025–26, GTAC will re-organise itself and transition to a hub-based structure, that includes the Technical Advisory Hub and a Programme Management Hub. This re-organisation is designed to sharpen its focus, streamline service offerings, and foster greater collaboration across operations, enabling it to respond more effectively to the needs of government.

The Technical Advisory Hub will consolidate expertise in institutional development through the Institutional Development Support (IDS) unit and public expenditure analysis done by the Public Expenditure and Policy Analysis (PEPA) unit. The Programme Management Hub will aim to support the incubation and implementation of key government programmes.

1.2 Overview of the Technical Advisory Hub

The Technical Advisory Hub at GTAC aims to provide strategic, technical, and analytical support to improve the efficiency and effectiveness, governance, and accountability of government institutions. The

¹ Sect. 2 (1) and (2) of the Schedule, Government Notice 261, 30 March 2012.; The Centre of Government Departments are National Treasury, DPME, DPSA and CoGTA

hub is designed to strengthen institutional arrangements and optimise public service delivery through evidence-based analysis, innovative strategies, and capacity-building initiatives.

The hub will be structured around key capability areas, each of which brings targeted expertise and services to its public sector clients:

1. **Institutional design:** This capability focuses on developing and/or restructuring the design and governance arrangements of public institutions. GTAC helps institutions navigate the regulatory framework governing the design of public institutions while encouraging innovative approaches to institutional design, ensuring that these bodies are resilient, adaptable, and aligned with citizen-centric goals.
2. **Operations optimisation:** This range of capabilities supports government departments in identifying inefficiencies and operational bottlenecks. Through business process mapping, turnaround strategies, and change management, among other techniques, it helps public institutions streamline operations to enhance service delivery.
3. **Strategy and facilitation:** The hub supports government institutions in crafting robust, evidence-based strategic plans that align with long-term national priorities. Strategy facilitation includes not only the development of strategic and annual performance plans but most importantly, ongoing support to management in reflecting on and adjusting these strategies to meet evolving challenges.
4. **Spending reviews and public finance management (PFM) analysis:** This area builds on existing expertise in spending reviews. It focuses on supporting spending reviews in government to optimise public resource allocation, improve fiscal sustainability, and ensure value for money.
5. **Data science and analytics:** Utilising advanced data analytics techniques and leveraging off artificial intelligence, machine learning and predictive analytics, this capability area uses big data to generate actionable insights for public policy and institutional management.
6. **Programme management:** The ability to design, coordinate, and oversee multiple interrelated projects that contribute to achieving strategic government objectives. Strong programme management capability enables government departments to prioritise high-impact initiatives, manage risks effectively, and ensure sustainable service delivery, while fostering collaboration across various stakeholders.
7. **Monitoring and evaluation:** This capability promotes the design and implementation of robust public sector M&E frameworks, the establishment of key performance indicators (KPIs) to evaluate programme effectiveness and the setup of systems to collect and manage qualitative and quantitative data. Progress and impact assessments are conducted by utilising data analysis to generate insights and provide evidence-based recommendations.

1.3 Technical Advisory Hub Resourcing Model

The Technical Advisory Hub deploys services to government departments and public entities through technical advisors that are procured from the market in anticipation of the business and project needs. A

small number of officials provide technical expertise as well, but most advisors and technical resources are procured and contracted to GTAC on a long-term basis. This core team may also be augmented with skills of short-term service providers contracted for once-off specific assignments, if required.

This innovative institutional arrangement allows the Hub to be agile and have expandable resources at its disposal to match the demand from its clients and establish suitably experienced teams for each individual project.

1.4 Purpose of this tender

GTAC seeks to establish a panel of qualified, skilled and experienced service providers/technical advisors that will support the technical advisory services mandate and execution for a period of 5 years.

The following tiers of technical advisors are included in this Terms of Reference:

Table 1: Technical advisor tiers and roles

Tier	Role	Years of experience required	Responsibilities
Tier I	Senior Advisor	12 years or more	Provide specialist technical advice (at a senior level) related to public sector organisations and institutional development.
	<i>Admin support to Senior Advisor</i>	<i>No technical experience required For this role, no CV is required, since this resource will be fully managed by the Senior Advisor.</i>	<i>Provide project support to the Senior Advisor, including organising project meetings, basic project administration and record keeping, data collection and research, setting up and conducting interviews, and drafting presentations. The Senior Advisor may choose to perform project support duties themselves but will be paid at the administrative rate (see Table 2).</i>
Tier II	Analyst/ Advisor	10 years or more	Provide specialist technical assistance (less experienced) related to public sector organisations and institutional development.

The professional rates of advisors are benchmarked against public service senior management service scales, taking into account reasonable adjustments for overhead costs of consultants. The hourly rate

for services may be adjusted annually depending on the availability of funds and at the sole discretion of GTAC.

The indicative maximum rates are indicated in the table below²:

Table 2: Maximum rate for Tier I and Tier II

Tier	Description	Maximum rates per hour
I	12 years' experience or more	R1 500 for technical work (including VAT) R350 for administrative project support (refer to Table 1: Technical advisor tiers and roles for Tier I) (including VAT)
II	10 years' experience or more	R1 200 (including VAT)

The panel will consist of 12 categories, some of which have sub-categories:

Table 3: Categories and sub-categories

Category	Sub-categories	Number of Tier I advisors sought	Number of Tier II advisors sought
Category 1: Public Sector Organisational Design and Development	Sub-category 1A: Institutional feasibility studies (situational and options analysis), business cases and implementation plans	4	4
	Sub-category 1B: Organisational structuring	6	0
	Sub-category 1C: Organisational development design	0	4
	Sub-category 1D: Organisational Business Analysis	0	4
Category 2: Public Sector Governance, Policy and Legal advice	Sub-category 2A: Governance and Policy advice	0	4
	Sub-category 2B: Legislative advice and drafting	4	0
	Sub-category 2C: Inter-Governmental Relations (IGR) and Local Governance Support	0	3
Category 3: Public Sector Procurement advice	No sub-category	0	3

² These maximum rates apply to all categories except for Category 11: Programme Management

Category	Sub-categories	Number of Tier I advisors sought	Number of Tier II advisors sought
Category 4: Public sector change management	No sub-category	3	3
Category 5: Public sector process facilitation	No sub-category	4	0
Category 6: Comprehensive Spending Reviews (all steps)	No sub-category	5	0
Category 7: Spending review Capacity Building	No sub-category	5	0
Category 8: Public Sector Data Analyst / Statistical Advisor	No sub-category	0	3
Category 9: Public Sector ICT, Business Process, and Systems Development Advisor	No sub-category	0	3
Category 10: Public sector economics and financial specialists	Sub-category 10A: Public Economics and Policy Advisors	2	6
	Sub-category 10B: Public Financial and Accounting Advisors	0	4
Category 11: Public Sector Programme management	No sub-category	4	0
Category 12: Public Sector Monitoring and Evaluation	No sub-category	4	0

The categories targeted are for service providers with the required specialist knowledge/capacity and capability to perform the tasks required.

Bidders must note that a maximum of three (3) CVs per category will be considered for evaluation purposes. In case a bidder provides more than three (3) CVs per category, GTAC will select the first three (3) CV entries for evaluation.

GTAC reserves the right to confirm with individuals where their names appear in more than one bid.

2 REQUIRED SERVICES AND SCOPE OF WORK

This section outlines the categories of advisory services for which GTAC intends to conclude framework agreements. Each category describes the anticipated scope of work, volume of assignments, evaluation criteria, and indicative rates inclusive of VAT.

Note on Calculation of Years of Experience

For the purposes of scoring, partial years of experience (i.e. periods less than 12 full months) will be rounded to the nearest full year. Experience of six months or more will be rounded up, while experience of less than six months will be rounded down.

Note on scoring the Duration and Breadth of Public Sector Experience

The duration and breadth of public sector experience is included as an evaluation criterion. The scoring will be based both on years of experience and the number of spheres of government as demonstrated in the table below.

Table 4: Scoring guide for the duration and breadth of public sector experience criterion

	1–2 years	3–5 years	6–10 years	11 plus years
1 sphere	1	2	2	3
2 spheres	1	2	3	4
3 spheres	1	3	4	5

For example, a score of 5 will be assigned for a demonstrated 11 or more years of experience within three spheres of government.

Note on technical evaluation criteria

Please note that the e-procurement system provides fields for all required information to be captured by the bidder for evaluation purposes.

2.1 Category 1: Public Sector Organisational Design and Development

2.1.1 Scope of work

The work for this category entails providing technical advice within GTAC and to client organs of state, including planning, managing and executing GTAC activities and projects in the area of organisational design and development.

A specialist understanding of public sector organisational development prescripts and dynamics is required, together with the ability to diagnose institution wide intricacies, and demonstrated experience in undertaking complex service delivery modelling, business case development, organisational design, operations management, analysis of organisational functions, development of organisational structures, costing of personnel, work studies and development of job descriptions. The advisors must ensure alignment with public sector legislation, regulations, and international best practices to enhance institutional efficiency, effectiveness, and service delivery.

Advisors play a crucial role in optimising institutional structures and processes, ensuring compliance with South African public sector frameworks, and enhancing public sector performance through effective organisational design and development strategies.

The advisors will be required to engage and interact on behalf of GTAC with client representatives and project partners at various levels of seniority. As such senior advisory experience is necessary.

2.1.2 Anticipated volume of work

GTAC intends awarding framework agreements to ten (10) tier I³ advisors (each supported by a junior resource), and twelve (12) tier II advisors, with appropriate skills and experience in the field of organisational design and development.

The following table indicates the intended number of framework agreements per sub-category:

Sub-category	Number of advisors for Tier I	Number of advisors for Tier II
1A: Institutional feasibility studies and business cases	4	4
1B: Organisational structuring	6	0
1C: Organisational development design	0	4
1D: Organisational business analysis	0	4

The level of effort required will depend on GTAC's fluctuating volume of business and the number of project assignments it will need to issue. It is estimated that GTAC will implement 90 projects over the

³ Refer to Table 1.

5-year period (approximately 18 projects per year), and an estimated 120 days per annum may be expected of an advisor. However, the specific number of days to be contracted will be specified in the Instruction to Perform Work (as explained in section 3 below).

2.1.3 Technical evaluation criteria

The technical proposal will be evaluated out of 100% with a threshold of 75%.

Part A. Qualification

Evaluation criteria	Scoring values	Weight	Evidence to be submitted
1. Highest academic qualification achieved in Organisational Development/ Human Resources Management or Industrial Psychology/ Business Management/ Business Administration/ Public Management/ Public Policy/ Engineering/ Project Management or relevant field.	5 = Master Degree (NQF 9+) or higher 4 = Honours Degree/ Post-graduate Diploma (NQF 8) 3 = Bachelor Degree/ Advanced Diploma (NQF 7) 2 = Diploma/ Advanced Certificate (NQF 6) 1 = National Higher Certificate (NQF 5) 0 = Copies of qualifications not attached/ SAQA accreditation for international qualifications not attached/ qualification not relevant	15%	– Copies of academic certificates – SAQA accreditation (if the qualification is obtained from an international institution.)

Part B. Public Sector Experience

Evaluation criteria	Scoring values	Weight
1. Duration and breadth of public sector experience (refer to table 4)	5 = 11 or more years of experience across 3 spheres of government 4 = 11 or more years of experience across 2 spheres, or 6 – 10 years of experience within 2 or 3 spheres 3 = 11 or more years of experience across 1 sphere, or 6 – 10 years of experience in 2 or 3 spheres, or 3 – 5 years of experience in 3 spheres 2 = 3 – 10 years of experience in 1 sphere, or 3 – 5 years of experience in 1 or 2 spheres 1 = 1 – 3 years of experience in 1 or 2 or 3 spheres 0 = No public sector experience	10%

Evaluation criteria	Scoring values	Weight
<p>2. Nature of roles (leading vs. supporting)</p> <p>The proposed advisor should demonstrate their experience in leading significant public sector projects, i.e. major initiatives spanning multiple public sector institutions.</p> <p>Minor initiatives are on</p>	<p>5 = Leadership roles in 5 or more major initiatives</p> <p>4 = Leadership roles in 2 to 4 major initiatives</p> <p>3 = 1 leadership role (major or minor initiative), plus at least 3 supporting roles in major initiatives</p> <p>2 = Only supporting roles in major initiatives</p> <p>1 = Only supporting roles in minor initiatives</p> <p>0 = No evidence of project involvement</p>	10%

Part C. Sub–Category Expertise

Sub–Category 1A: Institutional feasibility studies and business cases

For Tier I Advisors

Evaluation criteria	Scoring values	Weight
<p>1. Relevant professional experience</p> <p>A minimum of 12 years demonstrated experience as a technical advisor in the public sector, with relevant experience in conducting institutional feasibility studies (situational and options analysis), business cases and implementation plans as per public sector prescripts and best practice.</p>	<p>5 = 16 or more years</p> <p>4 = 13 – 15 years</p> <p>3 = 12 years</p> <p>2 = 8 – 11 years</p> <p>1 = 1 – 7 years</p> <p>0 = No relevant experience</p>	30%
<p>2. Successfully completed projects</p> <p>The proposed advisor must be able to provide examples of successfully completed assignments or projects comprising institutional feasibility studies (situational and options analysis), business cases, and implementation plans.</p> <p>Please list your projects in order of 1.) relevance, 2.) most recent.</p>	<p>5 = 9 or more projects</p> <p>4 = 7 – 8 projects</p> <p>3 = 5 – 6 projects</p> <p>2 = 3 – 4 projects</p> <p>1 = 1 – 2 projects</p> <p>0 = No relevant projects provided</p>	15%
<p>3. Project management skills and experience</p> <p>The proposed advisor must have extensive experience in project management and coordination in the public sector (using the PMBOK as a leading methodology), with the ability to manage major projects from inception, through to design, implementation and closure.</p>	<p>5 = 15 or more years</p> <p>4 = 11 – 14 years</p> <p>3 = 10 years</p> <p>2 = 6 – 9 years</p> <p>1 = 1 – 5 years</p> <p>0 = No relevant experience</p>	20%

For Tier II Advisors

Evaluation criteria	Scoring values	Weight
<p>1. Relevant professional experience</p> <p>A minimum of 10 years demonstrated relevant</p>	<p>5 = 14 or more years</p> <p>4 = 11 – 13 years</p>	40%

Evaluation criteria	Scoring values	Weight
experience as a technical advisor in the public sector, with relevant experience in conducting institutional feasibility studies (situational and options analysis), business cases and implementation plans.	3 = 10 years 2 = 6 – 9 years 1 = 1 – 5 years 0 = No relevant experience	
2. The advisor must be able to provide examples of successfully completed assignments or projects comprising Institutional feasibility studies (situational and options analysis), business cases, and implementation plans. Please list your projects in order of 1.) relevance, 2.) most recent.	5 = 8 or more projects 4 = 6 – 7 projects 3 = 4 – 5 projects 2 = 2 – 3 projects 1 = 1 project 0 = No relevant projects provided	25%

Sub-Category 1B: Organisational structuring

For Tier I Advisors

Evaluation criteria	Scoring values	Weight
1. Relevant professional experience A minimum of 12 years demonstrated experience as a technical advisor in the public sector, with relevant experience in conducting reviews of organisational structures, development of organisational structures, review / analysis of functions, and organisational policy development.	5 = 15 or more years 4 = 13 – 14 years 3 = 12 years 2 = 8 – 11 years 1 = 1 – 7 years 0 = No relevant experience	30%
2. Successfully completed projects The proposed advisor must be able to provide examples of successfully completed assignments or projects in a combination of all of the following: <ul style="list-style-type: none"> - Reviews of organisational structures, - Development of organisational structures (and associated costing), - Review and design of service delivery models, - Review / analysis of functions, - Organisational policy development. Please list your projects in order of 1.) relevance, 2.) most recent.	5 = 9 or more projects 4 = 7 – 8 projects 3 = 5 – 6 projects 2 = 3 – 4 projects 1 = 1 – 2 projects 0 = No relevant projects provided	15%
3. Project management skills and experience The proposed advisor must be able to demonstrate strong practical skills in project management and coordination in the public sector (using the PMBOK as a leading methodology), with the ability to manage major projects from inception, through to design, implementation and closure.	5 = 15 or more years 4 = 11 – 14 years 3 = 10 years 2 = 6 – 9 years 1 = 1 – 5 years 0 = No relevant experience	20%

Sub–Category 1C: Organisational development design

For Tier II Advisors

Evaluation criteria	Scoring values	Weight
<p>1. Relevant professional experience</p> <p>A minimum of 10 years demonstrated relevant experience as a technical advisor in the public sector, with relevant experience in a combination of the following:</p> <ul style="list-style-type: none"> - Work method assessment, - Work measurement and post provisioning norms and standards, - Job analysis, evaluation and grading 	<p>5 = 14 or more years</p> <p>4 = 11 – 13 years</p> <p>3 = 10 years</p> <p>2 = 6 – 9 years</p> <p>1 = 1 – 5 years</p> <p>0 = No relevant experience</p>	40%
<p>2. The advisor must be able to provide examples of successfully completed assignments or projects in a combination of the following:</p> <ul style="list-style-type: none"> - Work method assessment, - Work measurement and post provisioning norms and standards, - Job analysis, evaluation and grading <p>Please list your projects in order of 1.) relevance, 2.) most recent.</p>	<p>5 = 8 or more projects</p> <p>4 = 6 – 7 projects</p> <p>3 = 4 – 5 projects</p> <p>2 = 2 – 3 projects</p> <p>1 = 1 project</p> <p>0 = No relevant projects provided</p>	25%

Sub–Category 1D: Organisational business analysis

For Tier II Advisors

Evaluation criteria	Scoring values	Weight
<p>1. Relevant professional experience</p> <p>A minimum of 10 years demonstrated relevant experience as a technical advisor in the public sector, with relevant experience in in a combination of the following:</p> <ul style="list-style-type: none"> - Value chain analysis - Business process mapping, analysis and re–engineering - Review and development of operating procedures 	<p>5 = 14 or more years</p> <p>4 = 11 – 13 years</p> <p>3 = 10 years</p> <p>2 = 6 – 9 years</p> <p>1 = 1 – 5 years</p> <p>0 = No relevant experience</p>	40%
<p>2. The advisor must be able to provide examples of successfully completed assignments or projects comprising projects in a combination of the following:</p> <ul style="list-style-type: none"> - Value chain analysis - Business process mapping, analysis and re–engineering 	<p>5 = 8 or more projects</p> <p>4 = 6 – 7 projects</p> <p>3 = 4 – 5 projects</p> <p>2 = 2 – 3 projects</p> <p>1 = 1 project</p> <p>0 = No relevant projects provided</p>	25%

Evaluation criteria	Scoring values	Weight
<ul style="list-style-type: none"> - Review and development of operating procedures <p>Please list your projects in order of 1.) relevance, 2.) most recent.</p>		

2.2 Category 2: Public Sector Governance, Policy and Legal advice

2.2.1 Scope of work

The work for this category entails providing technical advice within GTAC and to client organs of state, related to governance, policy, and legal advice in the public sector. This will include mandate analysis, analysis and development of diagnostics and/or feasibility studies, business case development, policy advice on policy affecting three spheres of government, analysis and advice on legislative reform processes, oversight and organisational performance improvements.

The Legislative Advisor and Legal Drafting advisors will provide specialist legal advice on legislative reforms, drafting and reviewing Bills, Acts, and Regulations, and ensuring alignment with constitutional and statutory requirements. This role requires expertise in legal analysis, statutory interpretation, drafting of Bills, and the development of governance frameworks that support sound legislative processes.

The advisors will be required to engage and interact on behalf of GTAC with client representatives and project partners at various levels of seniority. As such senior advisory experience is necessary and the ability to work across diverse government structures and sectors are essential.

The Intergovernmental Relations (IGR) and Local Governance advisor will provide technical advice on IGR policy environment, local government system, local government fiscal framework, governance of city administrations, and city management and city development strategy. This role requires the ability to analyse content, reflect on experience and write case studies and think-pieces at an advanced technical and/or academic level related to the work undertaken for GTAC.

2.2.2 Anticipated volume of work

GTAC intends awarding framework agreements to four (4) tier I and seven (7) tier II advisors, with appropriate skills and experience in the field of public sector governance, policy and legal advice, and Intergovernmental Relations (IGR) and Local Governance.

The following table indicates the intended number of framework agreements per sub-category:

Sub-category	Tier I	Tier II
2A: Governance and policy advice	0	4
2B: Legislative advice and drafting	4	0
2C: Intergovernmental Relations (IGR) and Local Governance	0	3

The level of effort required will depend on GTAC's fluctuating volume of business and the number of project assignments it will need to issue. It is estimated that GTAC will implement 90 projects over the 5-year period (approximately 18 projects per year), and an estimated 120 days per annum may be expected of an advisor. However, the specific number of days to be contracted will be specified in the Instruction to Perform Work (as explained in section 3 below).

2.2.3 Technical evaluation criteria

The technical proposal will be evaluated out of 100% with a threshold of 75%.

Part A. Qualification

Evaluation criteria	Scoring values	Weight	Evidence to be submitted
<p>For sub-category 2A: Highest academic qualification achieved in Business Management/ Business Administration/ Public Management/ Public Policy or Law.</p> <p>For sub-category 2B: Highest academic qualification achieved in law is required.</p> <p>For sub-category 2C: Highest academic qualification achieved in Public Sector Management/ Administration/ Planning/ Social Science/ Economics, or other relevant field.</p>	<p>5 = Master Degree (NQF 9) or higher</p> <p>4 = Honours Degree/Post-Graduate Diploma (NQF 8)</p> <p>3 = Bachelor Degree /Advanced Diploma (NQF 7)</p> <p>2 = Diploma/Advanced Certificate (NQF 6)</p> <p>1 = National Higher Certificate (NQF 5)</p> <p>0 = Non-submission of qualifications/ SAQA accreditation for international qualifications not attached/ No relevant qualification.</p>	15%	<p>– Copies of academic certificates</p> <p>– SAQA accreditation (if the qualification is obtained from an international institution.)</p>

Part B. Public Sector Experience

Evaluation criteria	Scoring values	Weight
1. Duration and breadth of public sector experience (refer to table 4)	<p>5 = 11 or more years across 3 spheres of government.</p> <p>4 = 11 or more years across 2 spheres, or 6 – 10 years in 3 spheres.</p> <p>3 = 11 or more years in 1 sphere, or 6 – 10 years in 2 spheres, or 3 – 5 years in 3 spheres.</p> <p>2 = 3 – 10 years in 1 sphere, or 3 – 5 years in 1 or 2 spheres.</p> <p>1 = 1 – 2 years in any number of spheres.</p> <p>0 = No relevant experience</p>	10%
2. Nature of roles (leading vs. supporting) The proposed advisor should demonstrate the experience in leading significant public sector projects, i.e. major initiatives	<p>5 = Leadership roles on 5 or more major initiatives</p> <p>4 = Leadership roles on 2 to 4 major initiatives</p> <p>3 = At least 1 leadership role, plus at least 3 supporting roles in major initiatives</p> <p>2 = Only supporting roles in major initiatives</p> <p>1 = Only supporting roles minor initiatives</p>	10%

Evaluation criteria	Scoring values	Weight
spanning multiple public sector institutions. Minor initiatives are on departmental level only.	0 = No evidence of project involvement	

Part C. Sub–Category Expertise

Sub–Category 2A: Governance and Policy advice

For Tier II Advisors

Evaluation criteria	Scoring values	Weight
<p>1. Relevant professional experience</p> <p>A minimum of 10 years demonstrated experience as a technical advisor in the public sector, with relevant experience in a combination of at least 3 of the following:</p> <ul style="list-style-type: none"> - Mandate analysis, in the context of business case development, and diagnostics and feasibility studies - Advice on legislative reform processes - Policy advice on policy affecting organs of state - Advice relating to PFMA and the three spheres of government 	<p>5 = 14 or more years</p> <p>4 = 11 – 13 years</p> <p>3 = 10 years</p> <p>2 = 6 – 9 years</p> <p>1 = 1 – 5 years</p> <p>0 = No relevant experience</p>	40%
<p>2. Successfully completed projects</p> <p>The proposed advisor must be able to provide examples of successfully completed assignments or projects in a combination of at least 3 of the following:</p> <ul style="list-style-type: none"> - Mandate analysis, in the context of business case development, and diagnostics and feasibility studies - Advice on legislative reform processes - Policy advice on policy affecting organs of state - Advice relating to PFMA and the three spheres of government <p>Please list your projects in order of 1.) relevance, 2.) most recent.</p>	<p>5 = 8 or more projects</p> <p>4 = 6 – 7 projects</p> <p>3 = 4 – 5 projects</p> <p>2 = 2 – 3 projects</p> <p>1 = 1 project</p> <p>0 = No relevant projects provided</p>	25%

Sub–Category 2B: Legislative advice and drafting

For Tier I Advisors

Evaluation criteria	Scoring values	Weight
<p>1. Relevant Professional Experience</p> <p>A minimum of 10 years demonstrated experience as</p>	<p>5 = 14 or more years</p> <p>4 = 11 – 13 years</p>	40%

Evaluation criteria	Scoring values	Weight
a legal practitioner (advocates, attorneys, and academics) drafting legislation (Bills, Acts or Regulations or research).	3 = 10 years 2 = 6 – 9 years 1 = 1 – 5 years 0 = No relevant experience	
2. Successfully completed projects Demonstrating a strong background in constitutional law, administrative law, and public sector governance. Experience working with parliamentary legal teams, regulatory agencies, and government law advisers. The proposed advisor must be able to provide examples of successfully completed assignments or projects involving the drafting of legislation (Bills, Acts or Regulations). Please list your projects in order of 1.) relevance, 2.) most recent.	5 = 8 or more projects 4 = 6 – 7 projects 3 = 4 – 5 projects 2 = 2 – 3 projects 1 = 1 project 0 = No relevant projects provided	25%

Sub–Category 2C: Intergovernmental Relations (IGR) and Local Governance Support

For Tier II Advisors

Evaluation criteria	Scoring values	Weight
1. Relevant Professional Experience A minimum of 10 years demonstrated experience as a technical advisor in the public sector, with relevant experience in a combination of at least 3 of the following: <ul style="list-style-type: none"> - Governance of city administrations including metropolitan cities and institutional development support - Inter–Governmental Relations policy environment - Local government system and fiscal framework - City management, and city development strategy 	5 = 14 or more years 4 = 11 – 13 years 3 = 10 years 2 = 6 – 9 years 1 = 1 – 5 years 0 = No relevant experience	40%
2. Successfully completed projects The proposed advisor must be able to provide examples of successfully completed assignments or projects in a combination of at least 3 of the following: <ul style="list-style-type: none"> - Governance of city administrations including metropolitan cities and institutional development support 	5 = 8 or more projects 4 = 6 – 7 projects 3 = 4 – 5 projects 2 = 2 – 3 projects 1 = 1 project 0 = No relevant projects provided	25%

Evaluation criteria	Scoring values	Weight
<ul style="list-style-type: none"> - Inter-Governmental Relations policy environment - Local government system and fiscal framework - City management, and city development strategy <p>Please list your projects in order of 1.) relevance, 2.) most recent.</p>		

2.3 Category 3: Public Sector Procurement advice

2.3.1 Scope of work

The work for this category entails providing technical advice within GTAC and to client organs of state, related to procurement advice in the public sector, providing expert technical advice on policy and legal frameworks governing public procurement in South Africa. This will include advising on compliance with national laws, while incorporating international best practices to improve procurement efficiency, accountability, and value for money; conducting research on procurement laws and policies; developing frameworks and best practice guidelines, improving compliance and governance structures; and providing strategic recommendations on legislative reforms and public sector procurement optimisation. The advisors will be required to engage and interact on behalf of GTAC with client representatives and project partners at various levels of seniority. As such senior advisory experience is necessary.

2.3.2 Anticipated volume of work

GTAC intends awarding framework agreements to three (3) tier II advisors, with appropriate skills and experience in the field of public sector procurement advice.

This is a new offering, and the level of effort required will depend on the growth and demand of this service area. It is estimated that GTAC may implement 15 projects over the 5-year period (approximately 3 projects per year), and an estimated 60 days per annum may be expected of an advisor. However, the specific number of days to be contracted will be specified in the Instruction to Perform Work (as explained in section 3 below).

2.3.3 Technical evaluation criteria

The technical proposal will be evaluated out of 100% with a threshold of 75%.

Part A. Qualification

Evaluation criteria	Scoring values	Weight	Evidence to be submitted
Highest academic qualification achieved in Business Management/ Business Administration/ Public Management/ Public Policy/ Procurement/ Law/ Engineering or Accounting.	5 = Master Degree (NQF 9) or higher 4 = Honours Degree / Post-Graduate Diploma (NQF 8) 3 = Bachelor degree/ Advanced Diploma (NQF 7) 2 = Diploma/Advanced Certificate (NQF 6) 1 = National Higher Certificate (NQF 5) 0 = Non-submission of qualifications/SAQA accreditation for international qualifications not	15%	– Copies of academic certificates – SAQA accreditation (if the qualification is obtained from an international institution.)

Evaluation criteria	Scoring values	Weight	Evidence to be submitted
	attached/ No relevant qualification.		

Part B. Public Sector Experience

Evaluation criteria	Scoring values	Weight
3. Duration and breadth of public sector experience (refer to table 4)	5 = 11 or more years across 3 spheres of government. 4 = 11 or more years across 2 spheres, or 6 – 10 years in 3 spheres. 3 = 11 or more years in 1 sphere, or 6 – 10 years in 2 spheres, or 3 – 5 years in 3 spheres. 2 = 3 – 10 years in 1 sphere, or 3 – 5 years in 2 spheres. 1 = 1 – 2 years in any number of spheres. 0 = No relevant experience	10%
4. Nature of roles (leading vs. supporting) The proposed advisor should demonstrate their experience in leading significant public sector projects, i.e. major initiatives spanning multiple public sector institutions. Minor initiatives are on departmental level only.	5 = Leadership roles in 5 or more major initiatives 4 = Leadership roles in 2 to 4 major initiatives 3 = 1 leadership role, plus at least 3 supporting roles in major initiatives 2 = Only supporting roles in major initiatives 1 = Only supporting roles minor initiatives 0 = No evidence of project involvement	10%

Part C. Category Expertise

For Tier II Advisors

Evaluation criteria	Scoring values	Weight
1. Relevant professional experience A minimum of 10 years demonstrated experience providing advisory services in public sector procurement. <ul style="list-style-type: none"> – Experience in designing and implementing procurement reform initiatives. – Proven track record of developing and advising on procurement policies and frameworks. – Extensive involvement in stakeholder engagement, particularly with government departments and regulatory agencies. 	5 = 14 or more years 4 = 11 – 13 years 3 = 10 years 2 = 6 – 9 years 1 = 1 – 5 years 0 = No relevant experience	40%

Evaluation criteria	Scoring values	Weight
<ul style="list-style-type: none"> – Experience in managing compliance audits and procurement risk assessments. – Knowledge of procurement strategies 		
<p>2. Successfully completed projects</p> <p>The proposed advisor must be able to provide examples of successfully completed assignments or projects involving a combination of the following:</p> <ul style="list-style-type: none"> - Compliance improvements - Achieving value for money - Advice and/or research on public sector procurement laws and related policies <p>Please list your projects in order of 1.) relevance, 2.) most recent.</p>	<p>5 = 8 or more projects</p> <p>4 = 6 – 7 projects</p> <p>3 = 4 – 5 projects</p> <p>2 = 2 – 3 projects</p> <p>1 = 1 project</p> <p>0 = No relevant projects provided</p>	25%

2.4 Category 4: Public Sector Change Management

2.4.1 Scope of work

The work includes providing expert technical advice and strategic support to client organs of state in the planning, execution, and management of change initiatives. The role involves designing and implementing organisational transformation strategies, supporting leadership development, and ensuring the sustainability of change interventions across the public sector. This requires experience in applying context-specific methodologies and approaches for successful embedding of change and reforms in public institutions. The advisor must have a deep understanding of public sector governance, organisational performance, and stakeholder engagement at multiple levels of seniority.

The advisors will be required to engage and interact on behalf of GTAC with client representatives and project partners at various levels of seniority. As such senior advisory experience is necessary.

2.4.2 Anticipated volume of work

GTAC intends awarding framework agreements to three (3) tier I and three (3) tier II advisors, with appropriate skills and experience in organisational change management and leadership development.

The level of effort required will depend on GTAC's fluctuating volume of business and the number of project assignments it will need to issue. It is estimated that GTAC will implement 20 projects over the 5-year period (approximately 4 projects per year), and an estimated 120 days per annum may be expected of an advisor. However, the specific number of days to be contracted will be specified in the Instruction to Perform Work (as explained in section 3 below).

2.4.3 Technical evaluation criteria

The technical proposal will be evaluated out of 100% with a threshold of 75%.

Part A. Qualification

Evaluation criteria	Scoring values	Weight	Evidence to be submitted
Highest academic qualification achieved in Change Management/ Organisational Leadership/ Organisational Management Systems/ Public Management or any other fields, accompanied by relevant training certificates in change management/organisational transformation/similar approaches and methodologies.	5 = Honours Degree or higher (NQF 8) and relevant certificate(s) 4 = Bachelor degree/ Advanced Diploma (NQF 7) and relevant certificate(s) 3 = Diploma/Advanced Certificate (NQF 6) and relevant certificate(s) 2 = National Higher Certificate (NQF 5) and relevant certificate(s) 1 = National Certificate (NQF 4) and relevant certificate(s)	15%	– Copies of academic certificates – SAQA accreditation (if the qualification is obtained from an international institution.)

Evaluation criteria	Scoring values	Weight	Evidence to be submitted
	0 = Non-submission of qualifications/ SAQA accreditation for international qualifications not attached/ No relevant qualification.		

Part B. Public Sector Experience

Evaluation criteria	Scoring values	Weight
1. Duration and breadth of public sector experience (refer to table 4)	5 = 11 or more years across 3 spheres of government. 4 = 11 or more years across 2 spheres, or 6 – 10 years in 3 spheres. 3 = 11 or more years in 1 sphere, or 6 – 10 years in 2 spheres, or 3 – 5 years in 3 spheres. 2 = 3 – 10 years in 1 sphere, or 3 – 5 years in 2 spheres. 1 = 1 – 2 years in any number of spheres. 0 = No relevant experience	10%
2. Nature of roles (leading vs. supporting) The proposed advisor should demonstrate the experience in leading significant public sector projects, i.e. major initiatives spanning multiple public sector institutions. Minor initiatives are on departmental level only.	5 = Leadership roles in 5 or more major initiatives 4 = Leadership roles in 2 to 4 major initiatives 3 = At least 1 leadership role, plus at least 3 supporting roles in major initiatives 2 = Only supporting roles in major initiatives 1 = Only supporting roles minor initiatives 0 = No evidence of project involvement	10%

Part C. Category Expertise

For Tier I Advisors

Evaluation criteria	Scoring values	Weight
1. Relevant professional experience A minimum of 12 years demonstrated experience as a technical advisor in the public sector, with relevant experience in the area of organisational change management and leadership development, in a combination of at least 3 of the following: <ul style="list-style-type: none"> - Development of change management interventions and/or strategies 	5 = 15 or more years 4 = 13 – 14 years 3 = 12 years 2 = 8 – 11 years 1 = 7 years or less 0 = No relevant experience	30%

Evaluation criteria	Scoring values	Weight
<ul style="list-style-type: none"> - Organisational change readiness assessments - Organisational culture and climate assessments - Stakeholder management and engagement (including developing stakeholder engagement plans, engaging with stakeholders and risk management) 		
<p>2. Successfully completed projects</p> <p>The proposed advisor must be able to provide examples of successfully completed assignments or projects in a combination of at least 3 of the following:</p> <ul style="list-style-type: none"> - Development of change management interventions and/or strategies - Organisational change readiness assessments - Organisational culture and climate assessments - Stakeholder management and engagement (including developing stakeholder engagement plans, engaging with stakeholders and risk management) <p>Please list your projects in order of 1.) relevance, 2.) most recent.</p>	<p>5 = 9 or more projects</p> <p>4 = 7 – 8 projects</p> <p>3 = 5 – 6 projects</p> <p>2 = 3 – 4 projects</p> <p>1 = 1 project</p> <p>0 = No relevant projects provided</p>	15%
<p>3. Project Management skills and experience</p> <p>The proposed advisor must be able to demonstrate strong practical skills in project management and coordination in the public sector (using the PMBOK as a leading methodology), with the ability to manage major projects from inception, through to design, implementation and closure.</p>	<p>5 = 15 or more years</p> <p>4 = 11 – 14 years</p> <p>3 = 10 years</p> <p>2 = 6 – 9 years</p> <p>1 = 1 – 5 years</p> <p>0 = No relevant experience</p>	20%

For Tier II Advisors

Evaluation criteria	Scoring values	Weight
<p>1. Relevant professional experience</p> <p>A minimum of 10 years demonstrated experience in organisational change management and leadership development, in a combination of at least 3 of the following:</p> <ul style="list-style-type: none"> – Development of change management interventions and/or strategies – Organisational change readiness assessments – Organisational culture and climate assessments – Stakeholder management and engagement (including developing stakeholder engagement 	<p>5 = 14 or more years</p> <p>4 = 11 – 13 years</p> <p>3 = 10 years</p> <p>2 = 6 – 9 years</p> <p>1 = 1 – 5 years</p> <p>0 = No relevant experience</p>	40%

Evaluation criteria	Scoring values	Weight
plans, engaging with stakeholders and risk management)		
<p>2. Successfully completed projects</p> <p>The proposed advisor must be able to provide examples of successfully completed assignments or projects in a combination of the following:</p> <ul style="list-style-type: none"> – Development of change management interventions and/or strategies – Organisational change readiness assessments – Organisational culture and climate assessments – Stakeholder management and engagement (including developing stakeholder engagement plans, engaging with stakeholders and risk management) <p>Please list your projects in order of 1.) relevance, 2.) most recent.</p>	<p>5 = 8 or more projects</p> <p>4 = 6 – 7 projects</p> <p>3 = 4 – 5 projects</p> <p>2 = 2 – 3 projects</p> <p>1 = 1 project</p> <p>0 = No relevant projects provided</p>	25%

2.5 Category 5: Public Sector Process Facilitation

2.5.1 Scope of work

The work includes providing technical advice within GTAC and to client organs of state, including planning, managing and executing GTAC activities within projects involving public sector process facilitation. This will include providing strategic guidance on in-person and virtual meetings, conferences, capacity building initiatives, workshops etc; advising on and / or developing meeting agenda and presentations or learning materials, advising on and / or providing key stakeholder liaison and engagements; facilitating discussions; providing minutes or meeting reports and recommendations; and enabling complex, cognitive development to find root through careful consideration of participants needs; and utilising innovative methods to ensure the attention of the participants and/or audience is kept active.

The advisors will be required to engage and interact on behalf of GTAC with client representatives and project partners at various levels of seniority. As such senior advisory experience is necessary.

2.5.2 Anticipated volume of work

GTAC intends awarding framework agreements to four (4) tier I advisors (each supported by a junior resource), with appropriate skills and experience in public sector process facilitation.

The level of effort required will depend on GTAC's fluctuating volume of business and the number of project assignments it will need to issue. It is estimated that GTAC will implement 50 projects over the 5-year period (approximately 10 projects per year), and an estimated 60 days per annum may be expected of an advisor. However, the specific number of days to be contracted will be specified in the Instruction to Perform Work (as explained in section 3 below).

2.5.3 Technical evaluation criteria

The technical proposal will be evaluated out of 100% with a threshold of 75%.

Part A. Public Sector Experience

Evaluation criteria	Scoring values	Weight
1. Duration and breadth of public sector experience (refer to table 4)	5 = 11 or more years across 3 spheres of government. 4 = 11 or more years across 2 spheres, or 6 – 10 years in 3 spheres. 3 = 11 or more years in 1 sphere, or 6 – 10 years in 2 spheres, or 3 – 5 years in 3 spheres. 2 = 3 – 10 years in 1 sphere, or 3 – 5 years in 2 spheres. 1 = 1 – 2 years in any number of spheres. 0 = No relevant experience	10%

Evaluation criteria	Scoring values	Weight
<p>2. Nature of roles (Leading vs. Supporting)</p> <p>The proposed advisor should demonstrate the ability to lead the facilitation of multi-stakeholder public sector engagements.</p>	<p>5 = Led facilitation in more than 5 meetings/events in the public sector over the past 3 years.</p> <p>4 = Led facilitation in 4 – 5 meetings/events in the public sector over the past 3 years.</p> <p>3 = Led facilitation in less than 4 meetings/events in the public sector over the past 3 years.</p> <p>2 = Co-facilitated meetings/events in the public sector over the past 3 years.</p> <p>1 = Co-facilitated meetings/events in the public sector for less than 3 years.</p> <p>0 = No relevant public sector engagement.</p>	15%

Part B. Category Expertise

For Tier I Advisors

Evaluation criteria	Scoring values	Weight
<p>1. Relevant professional experience</p> <p>A minimum of 12 years' demonstrated experience of facilitating strategic meetings and/or workshops in the public sector</p>	<p>5 = 16 or more years</p> <p>4 = 13 – 15 years</p> <p>3 = 12 years</p> <p>2 = 8 – 11 years</p> <p>1 = 1 – 7 years</p> <p>0 = No relevant experience</p>	35%
<p>2. Successfully completed projects</p> <p>The proposed advisor must be able to provide examples of relevant completed assignments or projects in facilitation (process facilitation, strategic planning, etc).</p> <p>Please list your projects in order of 1.) relevance, 2.) most recent.</p>	<p>5 = 15 or more projects</p> <p>4 = 10 – 14 projects</p> <p>3 = 7 – 9 projects</p> <p>2 = 4 – 6 projects</p> <p>1 = 1 – 3 projects</p> <p>0 = No relevant projects provided</p>	25%
<p>3. Project Management skills and experience</p> <p>The proposed advisor must be able to demonstrate strong practical skills in project management and coordination in the public sector (using the PMBOK as a leading methodology), with the ability to manage major projects from inception, through to design, implementation and closure.</p>	<p>5 = 15 or more years</p> <p>4 = 11 – 14 years</p> <p>3 = 10 years</p> <p>2 = 6 – 9 years</p> <p>1 = 1 – 5 years</p> <p>0 = No relevant experience</p>	15%

2.6 Category 6: Comprehensive Spending Reviews

2.6.1 Scope of work

The Comprehensive Spending Review consulting service will implement a structured six-step methodology to support evidence-based decision-making in public finance management. This integrated approach will enable government institutions to optimise resource allocation, improve efficiency, and enhance accountability in public spending.

The consulting service will conduct a thorough institutional analysis as Step 1, examining organisational design, governance arrangements, and regulations affecting programme implementation. This will include identifying institutional stability issues that may impact policy and programme roll-out, examining disjunctions between institutional governance and monitoring arrangements versus funding flows, and mapping the complexities of intergovernmental fiscal relations and constitutionally prescribed functions.

For Steps 2 & 3, the consulting service will develop and apply appropriate performance information analysis through logical framework analysis and indicators. This involves understanding policy and programmatic aims, assessing policy alignment with strategic objectives, clarifying underlying assumptions related to program resourcing and operations, and defining performance indicators to measure outputs, outcomes, and impacts. Business process analysis will be performed for smaller "pocket problems" to identify inefficiencies and potential savings, including mapping and analysing processes involved in program delivery.

Step 4 will consist of comprehensive expenditure data analysis of spending patterns. The consulting service will extract, consolidate, clean, and prepare raw expenditure data from financial systems such as BAS and PERSAL, conduct trend analysis to identify key expenditure patterns, perform disaggregated analysis by department, geographic location, and spending categories, integrate expenditure data with performance information, and apply advanced analytical techniques to identify cost drivers and inefficiencies.

For Step 5, the consulting service will develop appropriate cost models to support decision-making, identifying key variables influencing cost structures, developing models that assess financial impacts of various policy scenarios, exploring fiscal implications of different expenditure decisions, identifying cost-saving opportunities and efficiency gains, and applying simplified modelling approaches for "pocket problems" where appropriate.

Step 6 will focus on reporting and communication. The consulting service will prepare reports in the "1–3–25" page format (one-page ministerial summary, three-page outline for accounting officers, and 25-page main report), develop visual dashboards and infographic materials, present recommendations in concise, actionable "elevator pitch" format for key decision-makers, and prepare presentation materials for stakeholder meetings.

Deliverables will include a comprehensive spending review report with integrated findings following the "1–3–25" format, data analysis files and financial models with documentation, visual communication materials (infographics, dashboards), briefing materials for senior officials and ministers, and an implementation roadmap for recommended changes.

2.6.2 Anticipated volume of work

GTAC intends awarding framework agreements to five (5) tier I individuals with appropriate skills and experience in spending reviews.

The level of effort required will depend on GTAC's fluctuating volume of business and the number of project assignments it will need to issue. Based on experience, GTAC issued between 150 days and 560 days of work per year in total. However, the specific number of days to be contracted will be specified in the Instruction to Perform Work (as explained in section 3 below).

2.6.3 Technical evaluation criteria

The technical proposal will be evaluated out of 100% with a threshold of 75%.

Part A. Qualification

Evaluation criteria	Scoring values	Weight (%)	Evidence to be submitted
Highest academic qualification achieved.	5 = Master Degree (NQF 9) or higher 4 = Honours Degree / Post-Graduate Diploma (NQF 8) 3 = Bachelor degree/ Advanced Diploma (NQF 7) 2 = Diploma/Advanced Certificate (NQF 6) 1 = National Higher Certificate (NQF 5) 0 = Non-submission of qualifications/ SAQA accreditation for international qualifications not attached/ No relevant qualification.	10%	– Copies of academic certificates – SAQA accreditation (if the qualification is obtained from an international institution.)

Part B. Public Sector Experience

Evaluation criteria	Scoring values	Weight
1. Duration and breadth of public sector experience (refer to table 4)	5 = 11 or more years across 3 spheres of government. 4 = 11 or more years across 2 spheres, or 6 – 10 years in 3 spheres. 3 = 11 or more years in 1 sphere, or 6 – 10 years in 2 spheres, or	15%

Evaluation criteria	Scoring values	Weight
	3 – 5 years in 3 spheres. 2 = 3 – 10 years in 1 sphere, or 3 – 5 years in 2 spheres. 1 = 1 – 2 years in any number of spheres. 0 = No relevant experience	
2. Nature of roles (leading vs. supporting) The proposed advisor should demonstrate the experience in leading significant public sector projects, i.e. major initiatives spanning multiple public sector institutions. Minor initiatives are on departmental level only.	5 = Leadership roles in 5 or more major initiatives 4 = Leadership roles in 2 to 4 major initiatives 3 = At least 1 leadership role, plus at least 3 supporting roles in major initiatives 2 = Only supporting roles in major initiatives 1 = Only supporting roles minor initiatives 0 = No evidence of project involvement	10%

Part C. Spending Review Experience

For Tier I Advisors

Evaluation criteria	Scoring values	Weight (%)
1. Relevant professional experience A minimum of 7 years' demonstrated experience of <ul style="list-style-type: none"> – policy analysis and logical framework methodology (Spending Review Step 1–3) and/or – data analysis using government financial systems (BAS/PERSAL) and large datasets (Spending Review Step 4) and/or – public sector costing and modelling (Spending Review Step 5). 	5 = 11 or more years 4 = 8 – 10 years 3 = 7 years 2 = 3 – 6 years 1 = 1 – 2 years 0 = No relevant experience	25%
2. Successfully completed projects The proposed advisor must be able to provide examples of successfully completed assignments or spending review projects in: <ul style="list-style-type: none"> – policy analysis and logical framework methodology (Step 1–3) and/or – data analysis using government financial systems (BAS/PERSAL) and large datasets (Step 4) and/or – public sector costing and modelling (Step 5). Please list your spending review projects in order of 1.) relevance, 2.) most recent.	5 = 8 or more projects 4 = 6 – 7 projects 3 = 4 – 5 projects 2 = 2 – 3 projects 1 = 1 project 0 = No relevant projects provided	20%

Evaluation criteria	Scoring values	Weight (%)
3. Depth of experience in Spending Review implementation (Spending Review Steps 1–6)	5 = Led 5 or more spending reviews 4 = Led 3 to 4 spending reviews 3 = Led 1 to 2 spending reviews 2 = Supported 3 or more spending reviews 1 = Supported 2 or 1 spending reviews 0 = No spending review experience	20%

2.7 Category 7: Spending Review Capacity Building

2.7.1 Scope of work

GTAC seeks experts to design and deliver comprehensive training programmes for government officials involved in spending reviews. This entails developing and customising training materials that cover core methodologies such as logical frameworks, cost modelling, and data analysis, and incorporating practical exercises and real-world examples to demonstrate their application. Experts will provide hands-on support and coaching, guiding participants through the entire spending review process to produce evidence-based recommendations. They will also facilitate knowledge transfer through interactive sessions, fostering collaborative learning and critical engagement with relevant tools and techniques. The training will be structured to build both technical skills and strategic thinking, enabling government departments to independently manage spending reviews. Successful candidates will possess substantial public sector experience, preferably across multiple spheres of government, with a proven track record in leading public finance or spending review initiatives. They must also demonstrate proven experience in developing and delivering public finance training modules, with specific expertise in cost modelling, data analysis, and logical frameworks. Ultimately, the goal is to equip government officials with the knowledge and tools necessary to execute robust spending reviews, thereby contributing to more efficient, transparent, and effective public expenditure.

2.7.2 Anticipated volume of work

GTAC intends awarding framework agreements to five (5) Tier I individuals with appropriate skills and experience. The level of effort required will depend on GTAC's fluctuating volume of business and the number of project assignments it will need to issue. The specific number of days to be contracted will be specified in the Instruction to Perform Work (as explained in section 3 below).

2.7.3 Technical evaluation criteria

The technical proposal will be evaluated out of 100% with a threshold of 75%.

Part A. Qualification

Evaluation criteria	Scoring values	Weight (%)	Evidence to be submitted
Highest academic qualification achieved.	5 = Master Degree (NQF 9) or higher 4 = Honours Degree/Post-Graduate Diploma (NQF 8) 3 = Bachelor degree/ Advanced Diploma (NQF 7) 2 = Diploma/Advanced Certificate (NQF 6) 1 = National Higher Certificate (NQF 5) 0 = Non-submission of qualifications/ SAQA accreditation for international	10%	– Copies of academic certificates – SAQA accreditation (if the qualification is obtained from an international institution.)

Evaluation criteria	Scoring values	Weight (%)	Evidence to be submitted
	qualifications not attached/ No relevant qualification.		

Part B. Public Sector Experience

Evaluation criteria	Scoring values	Weight (%)
1. Duration and breadth of public sector experience (refer to table 4)	5 = 11 or more years across 3 spheres of government. 4 = 11 or more years across 2 spheres, or 6 – 10 years in 3 spheres. 3 = 11 or more years in 1 sphere, or 6 – 10 years in 2 spheres, or 3 – 5 years in 3 spheres. 2 = 3 – 10 years in 1 sphere, or 3 – 5 years in 2 spheres. 1 = 1 – 2 years in any number of spheres. 0 = No relevant experience	15%
2. Nature of roles (leading vs. supporting) The proposed advisor should demonstrate their experience in leading significant public sector projects, i.e. major initiatives spanning multiple public sector institutions. Minor initiatives are on departmental level only.	5 = Leadership roles in 5 or more major initiatives 4 = Leadership roles in 2 to 4 major initiatives 3 = At least 1 leadership role, plus at least 3 supporting roles in major initiatives 2 = Only supporting roles in major initiatives 1 = Only supporting roles minor initiatives 0 = No evidence of project involvement	10%

Part C. Category expertise

For Tier I Advisors

Evaluation criteria	Scoring values	Weight (%)
1. Relevant professional experience A minimum of 7 years' demonstrated experience of <ul style="list-style-type: none"> – policy analysis and logical framework methodology (Spending Review Step 1–3) and / or – data analysis using government financial systems (BAS/PERSAL) and large datasets (Spending Review Step 4) and / or – public sector costing and modelling (Spending Review Step 5). 	5 = 11 or more years 4 = 8 – 10 years 3 = 7 years 2 = 3 – 6 years 1 = 1 – 2 years 0 = No relevant experience	25%

Evaluation criteria	Scoring values	Weight (%)
2. Experience delivering training sessions on spending reviews or public finance topics.	5 = 10 or more sessions delivered 4 = 6 – 9 sessions 3 = 3 – 5 sessions 2 = 1 – 2 sessions 1 = Any lecturing experience that does not necessarily include spending reviews or public finance topics. 0 = No training session/lecturing experience	20%
3. Experience in developing, updating or customisation of spending review training materials	5 = Developed, updated or customised 5 or more comprehensive spending review training modules or sets of materials 4 = Developed, updated or customised 3 to 4 comprehensive modules/materials 3 = Developed, updated or customised 2 comprehensive modules/materials 2 = Developed, updated or customised 1 comprehensive module 1 = Partial or limited involvement 0 = No experience	20%

2.8 Category 8: Public Sector Data Analyst / Statistical Advisor

2.8.1 Scope of work

The Public Sector Data Analyst / Statistical Advisor will be responsible for analysing and interpreting large administrative datasets (e.g. BAS, PERSAL, LOGIS) and official data from national statistical agencies (e.g. Statistics South Africa). Operating within an evidence-based organisation, the advisor will support policy formulation and strategic decision-making through credible, rigorous analysis. The role involves collaboration with diverse stakeholders, effective communication of findings, and alignment of analytical outputs with strategic objectives.

2.8.2 Anticipated volume of work

GTAC intends awarding framework agreements to three (3) tier II analysts with appropriate skills and experience.

The level of effort required will depend on GTAC's fluctuating volume of business and the number of project assignments it will need to issue.

2.8.3 Technical evaluation criteria

The technical proposal will be evaluated out of 100% with a threshold of 75%.

Part A. Qualifications

Evaluation criteria	Scoring values	Weight	Evidence to be submitted
Academic qualifications in Statistics/ Data/ Computer Science/ Quantitative fields. In the case of an MBA degree, please provide the next highest relevant qualification (which will be used for scoring).	5 = Master Degree (NQF 9) or higher 4 = Honours Degree / Post-Graduate Diploma (NQF 8) 3 = Bachelor degree/ Advanced Diploma (NQF 7) 2 = Diploma / Advanced Certificate (NQF 6) 1 = National Higher Certificate (NQF 5) 0 = Non-submission of qualifications/SAQA accreditation for international qualifications not attached/ No relevant qualification.	10%	– Copies of academic certificates – SAQA accreditation (if the qualification is obtained from an international institution.)

Part B. Public Sector Experience

Evaluation criteria	Scoring values	Weight
1. Duration and breadth of public sector experience (refer to table 4)	5 = 11 or more years across 3 spheres of government. 4 = 11 or more years across 2 spheres, or 6 – 10 years in 3 spheres.	10%

Evaluation criteria	Scoring values	Weight
	3 = 11 or more years in 1 sphere, or 6 – 10 years in 2 spheres, or 3 – 5 years in 3 spheres. 2 = 3 – 10 years in 1 sphere, or 3 – 5 years in 2 spheres. 1 = 1 – 2 years in any number of spheres. 0 = No relevant experience	
2. Nature of roles (leading vs. supporting) The proposed advisor should demonstrate their experience in leading significant public sector projects, i.e. major initiatives spanning multiple public sector institutions. Minor initiatives are on departmental level only.	5 = Leadership roles in 5 or more major initiatives 4 = Leadership roles in 2 to 4 major initiatives 3 = At least 1 leadership role, plus at least 3 supporting roles in major initiatives 2 = Only supporting roles in major initiatives 1 = Only supporting roles minor initiatives 0 = No evidence of project involvement	10%

Part C. Category Expertise

For Tier II Advisors

Data Management & Big Data Technologies

Evaluation criteria	Scoring values	Weight
A minimum of 10 years of experience, leading or directing large-scale data analysis initiatives in the public sector, demonstrating expertise in data governance and quality assurance and experience in analysing large administrative datasets (e.g. PERSAL, BAS, LOGIS)	5 = 14 or more years 4 = 11 – 13 years 3 = 10 years 2 = 6 – 9 years 1 = 1 – 5 years 0 = No relevant experience	20%

Statistical Methods

Evaluation criteria	Scoring values	Weight
A minimum of 10 years' experience applying advanced statistical methods to public sector data, with demonstrable impact on policy or operational decisions.	5 = 14 or more years 4 = 11 – 13 years 3 = 10 years 2 = 6 – 9 years 1 = 1 – 5 years 0 = No relevant experience	20%

Proficiency with Statistical Software

Evaluation criteria	Scoring values	Weight
A minimum of 10 years' experience in using data analysis software products (e.g. R, Python, SAS, STATA)	5 = 14 or more years 4 = 11 – 13 years 3 = 10 years 2 = 6 – 9 years 1 = 1 – 5 years 0 = No relevant experience	20%

Artificial Intelligence (AI) Application for Government Efficiency & Automation

Evaluation criteria	Scoring values	Weight
Successfully completed projects: The proposed advisor must be able to provide examples of successfully completed assignments or projects where Artificial Intelligence (AI) was applied to enhance efficiency in government processes, such as automating workflows, optimising resource allocation, improving forecasting, or supporting data-driven decision-making.	5 = 8 or more projects 4 = 6 – 7 projects 3 = 4 – 5 projects 2 = 2 – 3 projects 1 = 1 project 0 = No relevant projects provided.	10%

2.9 Category 9: Public Sector ICT Advisor

2.9.1 Scope of work

The advisor will provide expert guidance on business processes and systems development in ICT systems within the South African public sector. This role is critical in evaluating, improving, and ensuring cost-effective ICT investments by government entities. The advisor will assess ICT system quality, procurement terms, and pricing to enhance efficiencies, ensuring alignment with government policy frameworks and GTAC's evidence-based approach. This category does not include primary system development or technical ICT resources.

2.9.2 Anticipated volume of work

GTAC intends awarding framework agreements to three (3) tier II analysts with appropriate skills and experience.

The level of effort required will depend on GTAC's fluctuating volume of business and the number of project assignments it will need to issue.

2.9.3 Technical evaluation criteria

The technical proposal will be evaluated out of 100% with a threshold of 75%.

Part A. Qualifications

Evaluation criteria	Scoring values	Weight	Evidence to be submitted
Highest academic qualification achieved in Computer Science/ Information Systems/ Software Engineering/ Business Informatics/ Public Administration (with ICT focus)/ ICT Management/ Digital Governance/ Data Science & Analytics, or a related field. In the case of an MBA degree, please provide the next highest relevant qualification (which will be used for scoring).	5 = Master Degree (NQF 9) or higher 4 = Honours Degree/Post-Graduate Diploma (NQF 8) 3 = Bachelor degree/ Advanced Diploma (NQF 7) 2 = Diploma/Advanced Certificate (NQF 6) 1 = National Higher Certificate (NQF 5) 0 = Non-submission of qualifications/ SAQA accreditation for international qualifications not attached/ No relevant qualification.	10%	– Copies of academic certificates – SAQA accreditation (if the qualification is obtained from an international institution.)

Part B. Public Sector Experience

Evaluation criteria	Scoring values	Weight
1. Duration and breadth of public sector experience (refer to table 4)	5 = 11 or more years across 3 spheres of government. 4 = 11 or more years across 2 spheres, or	10%

Evaluation criteria	Scoring values	Weight
	6 – 10 years in 3 spheres. 3 = 11 or more years in 1 sphere, or 6 – 10 years in 2 spheres, or 3 – 5 years in 3 spheres. 2 = 3 – 10 years in 1 sphere, or 3 – 5 years in 2 spheres. 1 = 1 – 2 years in any number of spheres. 0 = No relevant experience	
2. Nature of roles (leading vs. supporting) The proposed advisor should demonstrate their experience in leading significant public sector projects, i.e. major initiatives spanning multiple public sector institutions. Minor initiatives are on departmental level only.	5 = Leadership roles in 5 or more major initiatives 4 = Leadership roles in 2 to 4 major initiatives 3 = 1 leadership role (major or minor initiative), plus at least 3 supporting roles in major initiatives 2 = Only supporting roles in major initiatives 1 = Only supporting roles in minor initiatives 0 = No evidence of project involvement	10%

Part C. Category Expertise

For Tier II Advisors

Evaluation criteria	Scoring values	Weight
Relevant Professional Experience: A minimum of 10 years demonstrated experience in advisory or technical roles in public sector ICT projects related to ICT system evaluations, ICT procurement, or ICT governance.	5 = 14 or more years 4 = 11 – 13 years 3 = 10 years 2 = 6 – 9 years 1 = 1 – 5 years 0 = No relevant experience	20%
Number of relevant projects undertaken Public sector ICT projects covering one or more of the following are relevant: ICT system evaluations; ICT procurement, ICT governance. A significant contribution means the advisor held a clearly defined role with direct responsibility for design, analysis, implementation, or oversight of the project deliverables, beyond routine support or attendance.	5 = Led or contributed significantly to 8 or more projects. 4 = Contributed significantly to 6 – 7 projects. 3 = Contributed significantly to 4 – 5 projects. 2 = Contributed significantly to 2 – 3 projects. 1 = Contributed significantly to 1 project. 0 = No relevant project experience.	20%
Public sector ICT policy knowledge & application	5 = Demonstrated involvement in 8 or more relevant projects.	20%

Evaluation criteria	Scoring values	Weight
<p>Public sector ICT projects requiring the application of South African public sector ICT policies or procurement frameworks are relevant.</p>	<p>4 = Involved in 6 – 7 relevant projects.</p> <p>3 = Involved in 4 – 5 relevant projects.</p> <p>2 = Involved in 2 – 3 relevant projects.</p> <p>1 = Involved in 1 relevant project</p> <p>0 = No relevant project experience.</p>	
<p>Stakeholder engagement and project delivery record</p> <p>Public–sector ICT projects with stakeholders from more than one department or entity are relevant.</p>	<p>5 = Led or played a key role in 8 or more relevant projects with demonstrated engagement with senior or middle management officials.</p> <p>4 = Involved in 6–7 such projects with demonstrated engagement with senior or middle management officials.</p> <p>3 = Involved in 4–5 such projects with demonstrated engagement with senior or middle management officials.</p> <p>2 = Involved in 2–3 projects with stakeholder engagement responsibilities.</p> <p>1 = Participated in 1 project with limited stakeholder engagement.</p> <p>0 = No relevant project experience.</p>	10%

2.10 Category 10: Public Sector Economics and Financial Specialists

2.10.1 Scope of work

The advisors in this category will provide expert guidance and advice in areas such as public economics, revenue and tax policy, debt management, fiscal policy, and intergovernmental fiscal relations. They will be required to undertake evidence-based analyses to inform public sector financial decisions and ensure alignment with government regulations and policies. This will include cost analysis and modelling; advice on public finance processes, systems and budget structures; formulating policy recommendations; conducting financial analysis; development of financing mechanisms and/or models; conducting socio-economic impact assessments; and preparing distributional analyses to evaluate equity and inclusivity.

In addition, public financial and accounting advisors will be required to provide financial and accounting advice to optimize public sector expenditure, ensure fiscal accountability, and develop sustainable financial models. They will support cost analysis, funding strategies, and institutional financial systems development.

The advisors will be required to engage and interact on behalf of GTAC with client representatives and project partners at various levels of seniority. As such senior advisory experience is necessary.

2.10.2 Anticipated volume of work

GTAC seeks to award framework agreements to two (2) Tier I and ten (10) Tier II analysts with appropriate skills and experience.

The following table indicates the intended number of framework agreements per sub-category:

Sub-category	Tier I	Tier II
Sub-Category 10A: Public Economics and Policy Advisors	2	6
Sub-Category 10B: Public Financial and Accounting Advisors	0	4

The level of effort required will depend on GTAC's fluctuating volume of business and the number of project assignments it will need to issue.

2.10.3 Technical evaluation criteria

The technical proposal will be evaluated out of 100% with a threshold of 75%.

Part A. Qualification

Evaluation criteria	Scoring values	Weight	Evidence to be submitted
For sub-category 10A: Highest academic qualification achieved in Economics/ Business	5 = Master Degree (NQF 9) or higher 4 = Honours Degree / Post-Graduate Diploma (NQF 8)	15%	– Copies of academic certificates

Evaluation criteria	Scoring values	Weight	Evidence to be submitted
<p>Management/ Business/ Administration/ Finance/ Public Policy, or Public Management.</p> <p>For sub-category 10B: Highest academic qualification achieved in Finance/ Accounting, or Public Financial Management.</p>	<p>3 = Bachelor degree/ Advanced Diploma (NQF 7)</p> <p>2 = Diploma / Advanced Certificate (NQF 6)</p> <p>1 = National Higher Certificate (NQF 5)</p> <p>0 = Non-submission of qualifications/SAQA accreditation for international qualifications not attached/ No relevant qualification.</p>		<p>– SAQA accreditation if the qualification is obtained from an international institution.</p>

Part B. Public Sector Experience

Evaluation criteria	Scoring values	Weight
<p>1. Duration and breadth of public sector experience (refer to table 4)</p>	<p>5 = 11 or more years across 3 spheres of government.</p> <p>4 = 11 or more years across 2 spheres, or 6 – 10 years in 3 spheres.</p> <p>3 = 11 or more years in 1 sphere, or 6 – 10 years in 2 spheres, or 3 – 5 years in 3 spheres.</p> <p>2 = 3 – 10 years in 1 sphere, or 3 – 5 years in 2 spheres.</p> <p>1 = 1 – 2 years in any number of spheres.</p> <p>0 = No relevant experience</p>	10%
<p>2. Nature of roles (leading vs. supporting)</p> <p>The proposed advisor should demonstrate the experience in leading significant public sector projects, i.e. major initiatives spanning multiple public sector institutions.</p> <p>Minor initiatives are on departmental level only.</p>	<p>5 = Leadership roles on 5 or more major initiatives</p> <p>4 = Leadership roles on 2 to 4 major initiatives</p> <p>3 = At least 1 leadership role, plus at least 3 supporting roles in major initiatives</p> <p>2 = Only supporting roles in major initiatives</p> <p>1 = Only supporting roles minor initiatives</p> <p>0 = No evidence of project involvement</p>	10%

Part C. Sub–Category Expertise

Sub–Category 10A: Public Economics and Policy Advisors

For Tier I Advisors

Evaluation criteria	Scoring values	Weight
<p>1. Relevant professional experience</p> <p>A minimum of 10 years demonstrated experience as a technical advisor in the public sector, with relevant experience in a combination of at least 4 of the following:</p> <ul style="list-style-type: none"> - cost analysis and modelling; - advice on public finance processes, systems and budget structures; - formulating policy recommendations; - conducting financial analysis; - development of financing mechanisms and/or models; - conducting socio–economic impact assessments 	<p>5 = 14 or more years</p> <p>4 = 11 – 13 years</p> <p>3 = 10 years</p> <p>2 = 6 – 9 years</p> <p>1 = 1 – 5 years</p> <p>0 = No relevant experience</p>	30%
<p>2. Successfully completed projects</p> <p>The proposed advisor must be able to provide examples of successfully completed assignments or projects in a combination of at least 4 of the following:</p> <ul style="list-style-type: none"> - cost analysis and modelling; - advice on public finance processes, systems and budget structures; - formulating policy recommendations; - conducting financial analysis; - development of financing mechanisms and/or models; - conducting socio–economic impact assessments <p>Please list your projects in order of 1.) relevance, 2.) most recent.</p>	<p>5 = 8 or more projects</p> <p>4 = 6 – 7 projects</p> <p>3 = 4 – 5 projects</p> <p>2 = 2 – 3 projects</p> <p>1 = 1 project</p> <p>0 = No relevant projects provided</p>	15%
<p>3. Project management skills and experience</p> <p>The proposed advisor must be able to demonstrate strong practical skills in project management and coordination in the public sector (using the PMBOK as a leading methodology), with the ability to manage major projects from inception, through to design, implementation and closure.</p>	<p>5 = 15 or more years</p> <p>4 = 11 – 14 years</p> <p>3 = 10 years</p> <p>2 = 6 – 9 years</p> <p>1 = 1 – 5 years</p> <p>0 = No relevant experience</p>	20%

For Tier II Advisors

Evaluation criteria	Scoring values	Weight
<p>1. Relevant professional experience</p> <p>A minimum of 10 years demonstrated experience as a technical advisor in the public sector, with relevant experience in a combination of at least 4 of the following:</p> <ul style="list-style-type: none"> - cost analysis and modelling; - advice on public finance processes, systems and budget structures; - formulating policy recommendations; - conducting financial analysis; - development of financing mechanisms and/or models; - conducting socio-economic impact assessments 	<p>5 = 14 or more years</p> <p>4 = 11 – 13 years</p> <p>3 = 10 years</p> <p>2 = 6 – 9 years</p> <p>1 = 1 – 5 years</p> <p>0 = No relevant experience</p>	40%
<p>2. Successfully completed projects</p> <p>The proposed advisor must be able to provide examples of successfully completed assignments or projects in a combination of at least 4 of the following:</p> <ul style="list-style-type: none"> - cost analysis and modelling; - advice on public finance processes, systems and budget structures; - formulating policy recommendations; - conducting financial analysis; - development of financing mechanisms and/or models; - conducting socio-economic impact assessments <p>Please list your projects in order of 1.) relevance, 2.) most recent.</p>	<p>5 = 8 or more projects</p> <p>4 = 6 – 7 projects</p> <p>3 = 4 – 5 projects</p> <p>2 = 2 – 3 projects</p> <p>1 = 1 project</p> <p>0 = No relevant projects provided</p>	25%

Sub-Category 10B: Public Financial and Accounting Advisors

For Tier II Advisors

Evaluation criteria	Scoring values	Weight
<p>1. Relevant professional experience</p> <p>A minimum of 10 years demonstrated experience as a technical advisor in the public sector, with relevant experience in a combination of at least 3 of the following:</p> <ul style="list-style-type: none"> - financial and accounting advice 	<p>5 = 14 or more years</p> <p>4 = 11 – 13 years</p> <p>3 = 10 years</p> <p>2 = 6 – 9 years</p> <p>1 = 1 – 5 years</p> <p>0 = No relevant experience</p>	40%

Evaluation criteria	Scoring values	Weight
<ul style="list-style-type: none"> - cost analysis and modelling, - funding strategies, - institutional financial systems development. 		
<p>2. Successfully completed projects</p> <p>The proposed advisor must be able to provide examples of successfully completed assignments or projects in a combination of at least 3 of the following:</p> <ul style="list-style-type: none"> - financial and accounting advice - cost analysis and modelling, - funding strategies, - institutional financial systems development. <p>Please list your projects in order of 1.) relevance, 2.) most recent.</p>	<p>5 = 8 or more projects</p> <p>4 = 6 – 7 projects</p> <p>3 = 4 – 5 projects</p> <p>2 = 2 – 3 projects</p> <p>1 = 1 project</p> <p>0 = No relevant projects provided</p>	25%

2.11 Category 11: Public Sector Programme Management

2.11.1 Scope of Work

Programme managers will provide strategic oversight and governance for government programmes. The role includes developing programme roadmaps, defining interdependencies, and ensuring effective execution while coordinating with government entities to align initiatives with national priorities.

Key responsibilities include stakeholder engagement, risk management, and compliance oversight, ensuring adherence to public sector financial and regulatory frameworks. The Programme Manager will also track performance, monitor impact, and report progress to GTAC and programme owners, providing insights for informed decision-making. Additionally, they will focus on capacity building and knowledge transfer to strengthen departmental capabilities and ensure programme sustainability beyond implementation.

Expected deliverables may include programme plans, governance frameworks, risk and compliance reports, and performance assessments to ensure transparency and accountability.

2.11.2 Anticipated volume of work

GTAC seeks to award framework agreements to four (4) Tier I advisors (each supported by a junior resource) with appropriate skills and experience in the field of Programme Management.

The level of effort required will depend on GTAC's fluctuating volume of business and the number of Programme assignments it will need to issue. It is estimated that GTAC will implement eight (8) to ten (10) programmes over the 5-year period (approximately two (2) programmes per year), and an estimated maximum of 230 days per annum may be expected of an advisor. However, the specific number of days to be contracted will be specified in the Instruction to Perform Work (as explained in section 3 below). Please note it is anticipated that a programme will span several years (3 – 5 years)

2.11.3 Technical evaluation criteria

The technical proposal will be evaluated out of 100% with a threshold of 75%.

Part A. Qualification

Evaluation criteria	Scoring values	Weight	Evidence to be submitted
Highest academic qualification achieved in Programme and Project Management/ Business Management/ Business Administration/ Public Management/ Engineering, or any related field.	5 = Master Degree (NQF 9) or higher 4 = Honours Degree / Post-Graduate Diploma (NQF 8) 3 = Bachelor degree/ Advanced Diploma (NQF 7) 2 = Diploma / Advanced Certificate (NQF 6)	15%	– Copies of academic certificates – SAQA accreditation (if the qualification is obtained from

Evaluation criteria	Scoring values	Weight	Evidence to be submitted
Also include any relevant courses (NQF rated) attended.	1 = National Higher Certificate (NQF 5) 0 = Non-submission of qualifications/SAQA accreditation for international qualifications not attached/ No relevant qualification.		an international institution.)

Part B. Public Sector Experience

Evaluation criteria	Scoring values	Weight
1. Duration and breadth of public sector experience	5 = 15 or more years, in multiple spheres of government 4 = 11 – 14 years, in multiple spheres of government 3 = 9 – 10 years, in multiple spheres of government 2 = 7 – 8 years, in multiple spheres of government 1 = Less than 7 years in multiple spheres of government 0 = No experience	10%
2. Nature of roles (leading vs. supporting) The proposed Programme Manager should demonstrate the ability to lead significant public sector projects.	5 = 7 or more leadership roles on major initiatives 4 = 5 – 6 leadership roles, plus supporting roles 3 = 3 – 4 Leadership roles, plus supporting roles 2 = 2 leadership roles, plus supporting roles 1 = 1 leadership role, plus supporting roles 0 = No leadership roles	10%

Part C. Category Expertise

For Tier I Advisors

Evaluation criteria	Scoring values	Weight
1. Relevant professional experience: Demonstrated experience as a programme manager. Programme manager must provide details of programme over the period of experience.	5 = 16 or more years 4 = 13 – 15 years 3 = 12 years 2 = 8 – 11 years 1 = 1 – 7 years 0 = No relevant experience	30%
2. Successfully completed programmes The proposed programme manager must be able to provide examples of successfully completed programmes. Please list your projects in order of 1.) relevance, 2.) most recent.	5 = 6 or more programmes 4 = 5 programmes 3 = 4 programmes 2 = 3 programmes 1 = 1 – 2 programmes 0 = No relevant programmes provided	30%

2.11.4 Maximum rates

For this category, the indicative maximum rate is R1 250 per hour (including VAT).

2.12 Category 12: Public Sector Monitoring and Evaluation (M&E)

2.12.1 Scope of work

The work includes designing and implementing robust public sector M&E frameworks, establishing key performance indicators (KPIs) to evaluate programme effectiveness and setting up systems for collecting and managing qualitative and quantitative data. By conducting formative, mid-term, and summative evaluations, the advisor will assess progress and impact, utilising data analysis to generate insights and provide evidence-based recommendations.

The advisors will be required to engage and interact on behalf of GTAC with client representatives and project partners at various levels of seniority. As such senior advisory experience is necessary.

2.12.2 Anticipated volume of work

GTAC intends awarding framework agreements to four (4) Tier I advisors (each supported by a junior resource), with appropriate skills and experience in public sector monitoring and evaluation.

The level of effort required will depend on GTAC's fluctuating volume of business and the number of project assignments it will need to issue. It is estimated that GTAC will implement 10 projects over the 5-year period, and an estimated 120 days per annum may be expected of an advisor. However, the specific number of days to be contracted will be specified in the Instruction to Perform Work (as explained in section 3 below).

2.12.3 Technical evaluation criteria

The technical proposal will be evaluated out of 100% with a threshold of 75%.

Part A. Qualification

Evaluation criteria	Scoring values	Weight	Evidence to be submitted
Highest academic qualification achieved in Public Administration/ Development Studies/ Monitoring & Evaluation/ Economics, or related fields, accompanied by relevant training certificates in monitoring and evaluation.	5 = Master Degree (NQF 9) or higher 4 = Honours Degree/Post-Graduate Diploma (NQF 8) 3 = Bachelor degree/ Advanced Diploma (NQF 7) 2 = Diploma / Advanced Certificate (NQF 6) 1 = National Higher Certificate (NQF 5) 0 = Non-submission of qualifications/SAQA accreditation for international qualifications not	15%	– Copies of academic certificates – SAQA accreditation (if the qualification is obtained from an international institution.)

Evaluation criteria	Scoring values	Weight	Evidence to be submitted
	attached/ No relevant qualification.		

Part B. Public Sector Experience

Evaluation criteria	Scoring values	Weight
1. Duration and breadth of public sector experience (refer to table 4)	5 = 11 or more years across 3 spheres of government. 4 = 11 or more years across 2 spheres, or 6 – 10 years in 3 spheres. 3 = 11 or more years in 1 sphere, or 6 – 10 years in 2 spheres, or 3 – 5 years in 3 spheres. 2 = 3 – 10 years in 1 sphere, or 3 – 5 years in 2 spheres. 1 = 1 – 2 years in any number of spheres. 0 = No relevant experience	10%
2. Nature of roles (leading vs. supporting) The proposed advisor should demonstrate the ability to lead significant public sector M&E projects.	5 = Led more than 5 evaluations 4 = Led 4 – 5 evaluations 3 = Led 3 evaluations 2 = Supported 3 or more evaluations 1 = Supported 1 – 2 evaluations 0 = No relevant experience	15%

Part C. Category Expertise

For Tier I Advisors

Evaluation criteria	Scoring values	Weight
1. Relevant professional experience A minimum of 12 years' demonstrated experience of public sector monitoring and evaluation.	5 = 16 or more years 4 = 13 – 15 years 3 = 12 years 2 = 8 – 11 years 1 = 1 – 7 years 0 = No relevant experience	40%
2. Successfully completed projects The proposed advisor must be able to provide examples of relevant completed assignments or projects in public sector monitoring and evaluation Please list your projects in order of 1.) relevance, 2.) most recent.	5 = 15 or more projects 4 = 10 – 14 projects 3 = 7 – 9 projects 2 = 4 – 6 projects 1 = 1 – 3 projects 0 = No relevant projects provided	20%

3 CONTRACTUAL CONDITIONS – FRAMEWORK AGREEMENT

The contracting method applied for this tender is that of a Framework Agreement (FA). GTAC will enter into one or more FAs with qualifying service providers per defined category or sub-category, to provide technical advisory services to GTAC over a 5-year period.

GTAC reserves the right to adjust the number of FAs awarded in cases where there are insufficient applications or where service providers are appointed in multiple categories, affecting the total number of service providers.

GTAC may augment the number of service providers on each of the categories or sub-categories as required through a tender process – FA holders will not be required to tender again.

GTAC may also augment the number of categories or sub-categories at any given time, in which case, it would publish a separate open tender.

The FA between GTAC and each of the successful bidders will establish the terms governing the Instruction to Perform Work (IPW) to be issued during the period of the contract, in particular with regard to:

- the rights and obligations of the contracting parties and the agreed procedures for the administration of the framework agreement and the issuing of IPWs
- the term (period) of the framework during which an IPW may be issued
- the scope of services which may be included in an IPW
- cost parameters (rates) to be utilised to enable IPW costs to be determined once the scope of services has been determined,
- the basis by which service providers will be remunerated for work performed in terms of an IPW, if and when such an IPW is issued; and
- the way IPWs will be allocated and issued.

3.1 Panel Structure

- Appointment onto the panel will not guarantee work and depends on the demand and volume of projects to be delivered by GTAC.
- Service providers are grouped into categories and sub-categories based on their expertise and technical evaluation scores from the initial bidding process.
- A service provider may qualify for multiple categories or sub-categories.
- Within each category, service providers are positioned according to their technical evaluation scores, with the highest-scoring service providers initially ranked at the top.
- Successful bidders will be informed of their ranking on the panel which will be applied for the roster system.

3.2 Panel Utilisation

The panel will be utilised using the principles below:

- The selection of service providers from the panel is based by default on a roster system between panel members per category and sub-category.
- A rotation register will be maintained to track service providers assigned within each category and sub-category
- Service providers are selected in sequence from the roster in the relevant category and sub-category.
- Each project is scoped to determine the required categories and sub-categories of service providers.
- After being issued an IPW, the service provider moves to the bottom of the roster within their category or sub-category.
- GTAC reserves the right to elevate a service provider up the rotation register in order to achieve best value and ensure the right match of panel member to the requirements of the project assignment.

3.3 Exceptions to the Roster System

Certain conditions may necessitate deviation from the standard roster-based selection process. The justification for these exceptions must be clearly documented in the IPW to maintain transparency. These include:

- Highly specialised or complex scope of work and skills requirements.
- A service provider who has previously worked with the same client on a similar scope of work may be selected out of sequence if:
 - Their familiarity with the client's processes leads to increased efficiency.
 - They offer cost savings due to a reduced learning curve.
 - Their prior engagement resulted in improved project outcomes.
- Geographical considerations:
 - If a provider's physical proximity to the client offers advantages in terms of cost efficiency, response time, or service quality, they may be selected over service providers located further away.
- Unique skills:
 - A skill or requirement that was not foreseen at the time of tendering, for example, a project that demands a sector specific knowledge that was not explicitly listed in the original ToR but falls within the scope.
- Other exceptional circumstances that could not be foreseen during the drafting of this ToR.

3.4 Performance-Based Position Adjustments

Panel positions may be adjusted based on performance assessments, client feedback, and compliance with contractual obligations. Poor performance will result in a temporary suspension from the panel.

The panel rankings and roster system will be reviewed annually to reflect project-based performance assessments.

3.5 Instructions to perform work (IPW):

- IPWs may only cover services and work falling within the scope of work associated with the agreement, which may not be amended for the duration of the contract.
- IPWs may not be issued after the expiry of the term of the framework agreement (which may not exceed 5 years).

The official responsible for authorising an IPW, must confirm that the required services are within the scope of work associated with the relevant framework agreement.

3.6 Location of where the services are required

Panel service providers should be flexible to work with virtual meeting and webinar platforms (in particular MS Teams) and will have to be available to travel to attend meetings and facilitate support sessions in locations within and outside of Pretoria, and other locations as required.

3.7 Logistical Support

The panel service provider will be responsible for:

- The provision of any office facilities including computers, software licenses, telecommunications and stationery and administrative support as required,
- Own transport and mobile communications.

All costs for project-related travel will be covered by GTAC.

3.8 Reporting Requirements

Inputs into the following reports will be required to be submitted in the pre-agreed formats as material proof of delivery of services:

- Project progress reports monthly, quarterly and annually in various formats,
- Project close-out reports,
- Ad-hoc reports as may be required by GTAC,
- Close-out report at the end of the framework contract.

4 EVALUATION PROCESS

GTAC has set minimum standards that bidders must meet to be selected as a successful bidder, consisting of the following evaluation stages:

Evaluation stage	Description
Stage 1	Administrative Compliance – Non–Disqualification Submission of the administrative compliance documents as referred to in paragraph 4.1. Mandatory Compliance – Disqualification Failure to submit any of the required mandatory documents will lead to disqualification.
Stage 2	Technical Evaluation Bidders must submit information as per Bid Submission Requirements. The submitted technical proposal must respond to the Technical Evaluation criteria cited in these Terms of Reference. The Technical proposal will be evaluated out of 100% with a threshold of 75% . Only bidders that meet the threshold will be considered for the Price and Specific Goals evaluation.
Stage 3	Price and Specific Goals Evaluation Preference points in the 90/10 formula will be awarded to bidders for attaining a score for Specific goals as indicated in Table 6: Specific goals criteria. Bidders must provide the required information for evaluation purposes.
Final decision on award and selection onto the panel	Please note that in case of a tie following Stage 3: Price and Specific Goals Evaluation, where two or more bidders achieve the same total score, the following tie-breaking criteria will apply: (1) If two or more tenderers score an equal total number of points, the contract shall be awarded to the tenderer with the highest score for “Specific Goals”. (2) If two or more tenderers score equal total points in all respects, including “Specific Goals” the award shall be determined by random selection.

4.1 Stage 1a: Administrative Compliance (Non–Disqualification)

During this phase bid documents will be reviewed to determine compliance with tax matters and Central Supplier Database (CSD) at the closing date and time of the tender.

Bidders must submit all returnable documents as outlined in the table below.

Should a bidder fail to submit or fully complete the indicated SBD forms, the bidder must be requested to provide fully completed form(s) within two days from the date of notification. Failure to adhere to the notification will result in a bid being disqualified immediately after the two days have lapsed.

Table 5: 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
CSD registration report or CSD registration number or SARS pin	Bidders must be registered on the CSD at the closing date and time of the bid
<p>Tax matters</p> <p>A valid tax pin / CSD number must be provided for purposes of verifying that the tax matters of the bidder are in order. Where consortium / joint ventures / subcontractor is involved, each party to the association must submit a separate validation of tax status and CSD registration number.</p> <p>No tender shall be awarded 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 in the event that 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. The bidder shall be afforded the opportunity to rectify non-compliance with tax status in line with the conditions as prescribed in the relevant prescripts governing public procurement and this bid.</p>	
SBD 3.3 – Pricing Schedule	Complete the supplied pro forma document on the e-procurement system
<p>Note: A bidder who fails to complete or does not submit the SBD 3.3 form will be disqualified without being granted an opportunity to submit a price.</p>	
SBD 4 – Bidder's Disclosure (Refer to note below)	Complete the supplied pro forma document on the e-procurement system
<p>Note: Bidders must complete the SBD 4 document. 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, member of a bidder or supplier having the controlling interest in the bidder or supplier. – “State” means a national or provincial department, national or provincial public entity or constitutional institution, a municipality or municipal entity, a provincial legislature or parliament. 	
SBD 6.1 – Preferential Point Claim form in terms of the Preferential Procurement Regulation (PPR) 2022	<p>Complete the supplied pro forma document on the e-procurement system</p> <p>Failure to submit or fully complete SBD 6.1 from will result in the bidder forfeiting points for specific goals.</p>
<p>Bidders must note that a maximum of three (3) CVs per category will be considered for evaluation purposes. In case a bidder provides more than three (3) CVs per category, GTAC will select the first three (3) CV entries for evaluation.</p> <p>GTAC reserves the right to confirm with individuals where their names appear in more than one bid.</p>	

4.2 Stage 1b: Mandatory Compliance (Disqualification)

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

- Bidders must be registered on CSD on closing date of the tender.
- Submission of a price / financial proposal is required as per SBD 3.3 and must be entered into the vendor portal as part of the application process.
- Any bidder representative (Director / Shareholder / Proposed Resource) who is employed by the state will not be considered.

4.3 Stage 2: Technical Evaluation

- Bids will be evaluated strictly in accordance with the bid evaluation criteria stipulated in this ToR.
- In a case where there is a difference between the contents of this ToR and the e-procurement system, the ToR takes precedence.
- The description of evaluation criteria and associated scores and weights for each criterion are shown in section 2 under each category, sub-category and tier.
- 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 a framework agreement can be concluded.
- Please note that a Certificate of Membership shall not be deemed as proof of educational qualification (Education qualifications refers to certifications issued by institution of high learning e.g., certificate, diploma, degree, etc.)
- Non-submission of qualifications will lead to a score of zero for the qualifications technical criterion.
- All international qualifications must be accompanied by South African Qualifications Authority (SAQA) Accreditation.
- Non-submission of SAQA confirmation will lead to a score of zero for the qualifications technical criterion.

4.4 Stage 3: Price and Specific Goals Evaluation

- Preferential Procurement Evaluation will be based on the 90/10 principle since the panel will be for a period of five (5) years, however hourly rates (including VAT) will be used for evaluation purposes.
- The applicable formula (90/10) will be utilised to evaluate the bid, of which ninety (90) points are allocated for price as allocated in the enclosed form SBD 6.1 that must be completed, and the remaining ten (10) points are allocated for the specific goals as indicated in Table 6: Specific goals criteria below.
- Submission of a price proposal (SBD 3.3) is required on the e-procurement portal. Bidders need to provide hourly rates, inclusive of VAT.
- Price/financial proposals must be submitted in South African Rand.

- GTAC reserves the right to negotiate the rates with the recommended bidder(s).
- The CSD will be used for verification of specific goals claimed and confirmation of the final scores. Additional proof of compliance to specific goals may be submitted as part of the price proposal.
- In the case of an incomplete SBD 6.1 form (no points claimed), a bidder will obtain a score of zero for specific goals.
- GTAC intends to award 82 contracts in the different categories as set out in table 3.

Table 6: Specific goals criteria

Specific goal	Achievement level	Number of points that may be claimed
Persons historically disadvantaged on the basis of race	100% of company owned by people who are Black = 5 points ≥51% and <100% of company owned by people who are Black = 3 points >0% and <51% of company owned by people who are Black = 1 point 0% of company owned by people who are Black = 0 point	5
Persons historically disadvantaged on the basis of gender	100% of company owned by people who are women = 5 points ≥51% and <100% of company owned by people who are women = 3 points >0% and <51% of company owned by people who are women = 1 point 0% of company owned by people who are women = 0 point	5
Total		10

5 COMMUNICATION AND REQUESTS FOR CLARIFICATION

GTAC's Professional Services Procurement (PSP) unit will only communicate with bidders by email where bid clarity is sought, or to obtain information or to extend the validity period. For any enquiries, email: psp@gtac.gov.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 letter, electronic mail or any other form of correspondence) to any other government official, or 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.

6 LEGAL IMPLICATIONS

Successful service providers must be prepared to enter into a framework agreement with GTAC.

GTAC reserves the right to award this bid on a non-exclusive basis, i.e. GTAC may procure similar services outside this bid with the view of securing the best service and value for money.

7 BID VALIDITY PERIOD

The bid will be valid for a period of 120 (one hundred and twenty) days from the closing date of the bid.

8 BID SUBMISSION DETAILS

In order 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 user. This is the process of creating a user account on the 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 into the portal <https://vendorportal.gtac.gov.za/>
- Navigate to the tender menu.
- Select “Formal” and click on “Current”.
- Select the category/ categories (e.g. TEN0000000043/Cat 01A/T1) 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 GTAC e-procurement system is configured in such a way that each category listed in this ToR is issued as a separate tender.

Bidders may submit technical proposals for multiple categories, provided that they submit complete tender documentation for each category they wish to apply for.

For the purpose of completing each technical evaluation criterion, refer to the relevant field on the e-procurement system for guidance on how to complete the field.

Table 7: Tender reference numbers per category and sub-category

Category	Sub-categories	Tender reference number
Category 1: Public Sector Organisational Design and Development	Sub-category 1A: Institutional feasibility studies (situational and options analysis), business cases and implementation plans	TEN000000043/Cat 01A/T1 TEN000000043/Cat 01A/T2
	Sub-category 1B: Organisational structuring	TEN000000043/Cat 01B/T1
	Sub-category 1C: Organisational development design	TEN000000043/Cat 01C/T2
	Sub-category 1D: Organisational business analysis	TEN000000043/Cat 01D/T2
Category 2: Public Sector Governance, Policy and Legal advice	Sub-category 2A: Governance and policy advice	TEN000000043/Cat 02A/T2
	Sub-category 2B: Legislative advice and drafting	TEN000000043/Cat 02B/T1
	Sub-category 2C: Inter-Governmental Relations (IGR) and Local governance support	TEN000000043/Cat 02C/T2
Category 3: Public Sector Procurement advice	No sub-category	TEN000000043/Cat 03/T2
Category 4: Public sector change management	No sub-category	TEN000000043/Cat 04/T1 TEN000000043/Cat 04/T2
Category 5: Public sector process facilitation	No sub-category	TEN000000043/Cat 05/T1
Category 6: Comprehensive Spending Reviews (all steps)	No sub-category	TEN000000043/Cat 06/T1
Category 7: Spending review Capacity Building	No sub-category	TEN000000043/Cat 07/T1
Category 8: Public Sector Data Analyst / Statistical Advisor	No sub-category	TEN000000043/Cat 08/T2
Category 9: Public Sector ICT, Business Process, and Systems Development Advisor	No sub-category	TEN000000043/Cat 09/T2
Category 10: Public sector economics and financial specialists	Sub-category 10A: Public economics and policy advisors	TEN000000043/Cat 10A/T1 TEN000000043/Cat 10A/T2
	Sub-category 10B: Public financial and accounting advisors	TEN000000043/Cat 10B/T2
Category 11: Public sector programme management	No sub-category	TEN000000043/Cat 11/T1

Category	Sub-categories	Tender reference number
Category 12: Public sector monitoring and evaluation	No sub-category	TEN000000043/Cat 12/T1

The capturing process is in the form of a wizard with the e-procurement system guiding bidders through each step. Once all the required information is completed, the bid should be submitted. Only submitted bids will be eligible for evaluation.

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: psp@gtac.gov.za or contact the vendor support desk at:

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

9 NON-COMPULSORY BRIEFING SESSION

A non-compulsory briefing session will be held at a specified date and time as indicated in the cover / invitation letter of this bid. A non-compulsory briefing session will be held virtually via Microsoft (MS) Teams on (16 July 2025 at 10:00). Please see the link on the tender advert page.