



TERMS OF REFERENCE

FOR THE PROVISION OF EVALUATION SERVICES ON IMPACT EVALUATION OF JOBS FUND PROJECTS INTERVENING IN THE DIGITAL ECONOMY TO THE GOVERNMENT TECHNICAL ADVISORY CENTRE (GTAC)

Programme Identification

Name of Client	GTAC/Jobs Fund
Name of Project	Impact Evaluation of Jobs Fund Projects Intervening in the Digital Economy
Contracting Authority	Government Technical Advisory Centre (GTAC), National Treasury
Accountable Officer	Head of GTAC
Project Purpose	For the Provision of Evaluation Services on the Impact Evaluation of Jobs Fund Projects Intervening in the Digital Economy to the GTAC/ Jobs Fund

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1 Request for Proposal

Suitably qualified organisations are invited to respond to these Terms of Reference (ToR) to carry out an impact evaluation on selected Jobs Fund job creation and social impact projects that have intervened in the digital economy (with most focused on facilitating job placements in Information & Communications Technology [ICT] and Business Process Outsourcing [BPO]). It should be noted that service providers with performance audit experience **only** are not permitted to submit a proposal. This study requires experienced evaluators.

This request is issued by GTAC, under the authority of the National Treasury (NT), and will be made in accordance with NT procurement criteria and procedures.

2 Background Information

2.1 The Jobs Fund

The Employment Facilitation sub-programme was introduced by the National Treasury in 2011 to contribute to employment and inclusive growth by supporting innovative approaches to job creation and enterprise development. The main component of the programme is the Jobs Fund, a multi-year R9 billion investment which leverages complementary funding from public and private sector project partners.

The President announced the Jobs Fund during the State of the Nation Address on 10 February 2011. The objective of the Jobs Fund is to co-finance innovative public and private sector initiatives that will significantly contribute to job creation. The Jobs Fund operates on challenge fund principles, as a catalyst for innovation and investment in new ways of working that directly contribute to long-term sustainable employment creation.

Globally, challenge funds have emerged as an effective and versatile financing mechanism with which to channel public money to catalyse pro-poor innovation and investment in emerging markets and to provide profitable ways of improving market access for the poor. In practice, challenge funds are highly versatile and can be deployed across a variety of contexts and sectors, targeting a range of outcomes from financial education to enterprise-linked poverty reduction and 'pro-poor' growth.

The ultimate development goal of a challenge fund is, through a finite intervention period, to stimulate a long-term change in the way that local supply chains and market systems work to overcome cost, technology, financial, etc. barriers which may have excluded poor producers and households in the past. Systemic change in the way that market systems work is typically the desired outcome of a challenge fund and is the product of a coincidence of factors (new technology, an environment conducive to investment, a strong and innovative private investor, etc.).

The Jobs Fund assists partners in piloting innovative approaches to sustainable job creation through four funding windows, namely, Enterprise Development, Support for Work-seekers, Infrastructure and

Institutional Capacity Building. The Fund accepts applications from the private, public and non-governmental sectors during calls for proposals and project partners are required to share both risk and costs by matching the grant fund allocation generally on a ratio of 1:1.

As well as focusing on creating jobs for the unemployed, the Jobs Fund has an explicit learning and knowledge dissemination agenda, which is intended to encourage new thinking and new approaches to job creation. During the implementation process, a significant body of learning has been generated. Project-level evaluation presents an opportunity to initiate the process of documenting and sharing these insights in terms of what models are most successful in job creation and which of these models are replicable and show promise for scalability.

2.2 Projects Intervening in the Digital Economy

The Jobs Fund's primary aim is to support innovative initiatives that have the potential to significantly contribute to employment creation and social impact in South Africa. Since the Jobs Fund's inception in 2011, the economy has taken major shifts, one of which is the increasing demand for digital skills.

Several of the Jobs Fund-supported partners have responded to this growing demand for digital skills by implementing initiatives aimed at training young people to meet employer skills (support for work seekers-focused initiatives).

This evaluation aims to better understand the efficacy of the project models that are focused on the training and placement of largely youth in in-demand digital jobs.

3 Digital jobs – brief overview

The rise of digitisation in the world of work has led to the advent of digital jobs that did not exist before, reflecting changing trends and needs in the labour market. The variety of jobs where digital technology plays a main role is continually rising as more activities are increasingly becoming reliant on information and communication technologies (ICTs) to improve efficiency and results. Core tools for digital jobs include ICTs like computers, databases, smartphones and the internet, which they use to manipulate and manage information. Digital jobs are therefore made possible by ICT infrastructure, which includes the provision of internet connectivity, broadband networks, wireless networks, as well as computers, tablets and mobile phones¹.

3.1 Definition of digital jobs

The International Labour Organisation (ILO) highlights that digital jobs include both careers directly within the ICT industry, as well as careers in a wide variety of jobs outside the ICT industry that rely on

¹ Harji, K. and Best, H. (2013). Digital Jobs. Building Skills for the Future. Rockefeller Foundation.

digital skills and embrace digital technologies². Harji & Best (2013)³ state that “digital jobs are created through the application of information and communications technologies (ICT) to a new or existing activity or process – the jobs generally include performing information-based tasks that build the individual’s capacity for future work.”

The World Bank (2018)⁴ considers any worker who ‘uses digital technology or whose work is made possible by such technology’ a **digital worker**, and the jobs they carry out can therefore be considered digital jobs, though at varying degrees of intensity. In that regard, the concept of **digital jobs** ranges from those that are *intensive in technology* (such as programmers and digital artists) to more *traditional ones that incorporate digitisation to some extent* (for example, accountants and delivery drivers). Somewhere in the middle, there are *hybrid jobs* which are *complemented by relatively advanced digital skills* (like stockbrokers, marketing executives, and accountants using digital software).

3.2 Types of digital jobs and skills

The World Bank (2018)⁵ classifies digital jobs into three types, namely *ICT-intensive jobs*, *ICT-dependent jobs* and *ICT-enhanced jobs*. Descriptions of these job types are given in the table below.

Table 1: Types of digital jobs

Type of digital job	Description of digital job
ICT-intensive jobs	Jobs which are directly created through the production of ICT and through the intensive use of ICT. The jobs directly focus on ICT, and they cannot exist without the corresponding digital services, products or technologies – for example, mobile app development, software developer, online community manager, 3D animator, etc.
ICT-dependent jobs	Digital technology enables work to such a degree that the job cannot be performed without the technology. Jobs in this group use digital technologies to varying degrees and made possible by digital technology, but have a relevant proportion of essential skills from other disciplines - for example, customer service call centre, stockbroker, online freelance work, call centre analyst, travel agency manager, etc.
ICT-enhanced jobs	Job activities use technology to varying degrees, but can still be performed without using technology or an ICT tool - e.g., accounting, graphic design, shipping agent, etc.

Furthermore, the World Bank (2018)⁶ classifies digital skills into three types: *advanced digital skills*, *intermediate digital skills*, and *advanced digital skills* (Table 2).

² ILO (2022). Digitalization and Employment.

https://www.ilo.org/wcmsp5/groups/public/---ed_emp/documents/publication/wcms_854353.pdf

³ Harji, K. and Best, H. (2013). Digital Jobs. Building Skills for the Future. Rockefeller Foundation.

⁴ World Bank (2018). Digital Jobs for Youth: Young Women in the Digital Economy Solutions for Youth Employment. Annual Report 2018.

⁵ World Bank (2018). Digital Jobs for Youth: Young Women in the Digital Economy Solutions for Youth Employment. Annual Report 2018.

⁶ World Bank (2018). Digital Jobs for Youth: Young Women in the Digital Economy Solutions for Youth Employment. Annual Report 2018.

Table 2: Types of digital skills

Type of digital skills	Description of skills and tasks
Advanced digital skills	Skills necessary to create, manage, test and analyse ICTs. The skills relate to technology development, network management, machine learning, IoT, big data analysis, cybersecurity and blockchain technology. Examples of tasks include software development, cloud computing, etc.
Intermediate digital skills	Skills that enable one to use ICTs in more meaningful and beneficial ways. The skills are generally job-ready skills needed to perform work-related functions, such as desktop publishing and digital graphic design. Examples of tasks include digital marketing and social media management.
Basic digital skills	Generic ICT skills are required for nearly all digital jobs. Skills involve effective use of technology, including web research, online communication, and use of professional online platforms. Examples: using a keyboard, online search and sending emails.

Digital skills now account for a significant share of vacancies being created in the ever-increasing digital economy. For instance, in the United States (US), job postings for digital roles increased by 24% between 2018 and 2021⁷. The analysis of online job postings identifies at least five areas where digital skills will occupy a dominant position and play a key role. These areas include advanced data analytics, cybersecurity, programming, automation and Internet of Things (IoT), and digital business and sales skills.

This diversity of digital jobs opens opportunities for people when they upskill or develop digital skills to perform tasks their jobs require. For instance, the demand for jobs that require digital skills and competencies continues to grow much faster than expected. Occupations that were traditionally far from technology are gradually incorporating technology into their daily and basic activities, for example, truck and taxi drivers are now constantly using guiding systems with Global Positioning System (GPS), and apps for managing reservations and delivery plans.

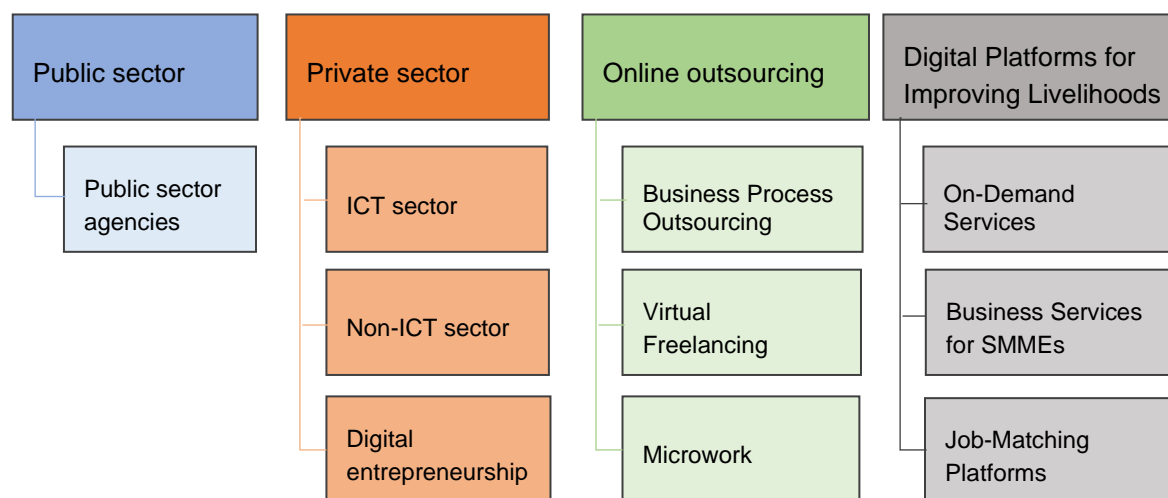
Digital jobs, thus, do not only exist in the digital sector (media, technology, digital marketing, etc), and their demand is not increasing only in the digital sector, but rather across all sectors and industries. In certain instances, categories of digital jobs may overlap. For example, most ICT-enhanced jobs are traditionally performed in offices or other standard workplaces but are enhanced by digital tools like word-processing, spreadsheets, etc. Jobs carried out online are technology dependent, that is they cannot happen without digitisation and often require specialised applications or hardware, like 3D design, financial analysis, etc. ICT-intensive jobs can appear as distance work like programmers or website developers acting as freelancers.

⁷ World Economic Forum (2022). Digital skills: How businesses and policymakers can respond to future demand in the labour market. <https://www.weforum.org/agenda/2022/11/digital-skills-labour-market-future/>

3.3 Drivers of demand for digital jobs

The World Bank (2018)⁸ Solutions for Youth Employment (S4YE) analysis reveals that almost two-thirds of youth employment programmes fail to have any impact on youth employment due to the lack of demand-side integration with enterprises. Figure 1 presents potential sources of digital jobs which are made possible by digital and frontier technologies. The jobs can be in industries dependent or directly focused on ICT, as well as adjacent to and enhanced by ICT.

Figure 1: Drivers of demand for digital jobs



4 Evaluation Objectives

4.1 Overall Objective

The general objective of the evaluation is to comprehensively assess the impact of digital job initiatives in creating and sustaining employment opportunities in the digital economy. This involves evaluating how well these initiatives have met their intended goals, such as improving job readiness, enhancing digital skills, and facilitating access to meaningful employment opportunities in the technology sector. The evaluation aims to determine whether the digital job programmes effectively addressed the needs of the target populations, including underserved or underrepresented groups, and whether they contribute to long-term career development and economic stability.

Additionally, the evaluation seeks to identify both the positive and negative outcomes of digital job initiatives, examining their broader impacts on participants, organisations, and the community. It also aims to uncover insights into the factors that contribute to the success or failure of these programmes, including programme design, implementation strategies, and external influences. By analysing these aspects, the evaluation provides valuable recommendations for improving current initiatives, scaling

⁸ World Bank (2018). Digital Jobs for Youth: Young Women in the Digital Economy Solutions for Youth Employment. Annual Report 2018.

successful models, and guiding future digital job programmes to ensure they effectively foster sustainable employment and economic growth in the digital sector.

The evaluation should be done based on the Organisation for Economic Co-operation and Development (OECD) Development Assistance Committee's (DAC) criteria upon which evaluative judgements are made in determining the merit or worth of a project intervention.

Table 3: DAC Criteria

Criteria	Definition
Relevance	The responsiveness of an intervention to the needs of target beneficiaries, and the ability to continue doing so if circumstances change.
Coherence	The compatibility of the intervention with other interventions in a country, sector or institution.
Effectiveness	The attainment of objectives and results, including differential results across groups.
Efficiency	Delivery of results in an economic and timely manner. Value for money is assessed by comparing outputs (qualitative and quantitative) in relation to inputs (resources).
Impact	The significant positive or negative, intended or unintended, higher-level effects. It assesses changes (social, economic, development and environmental) produced by the JF-supported projects, directly and indirectly, and intended and unintended.
Sustainability	The extent to which the net benefits of a project intervention are likely to continue.

4.2 Selected Projects

Eight Jobs Fund support projects have been selected to form part of the study as they are focused, in the main, on intervening in the digital economy (facilitating job placements in Information & Communications Technology [ICT] and Business Process Outsourcing [BPO]).

The table below provides the selected projects' implementation status, their location and the number of jobs created from inception to date (ITD). More detail is included in the next section.

Table 4 - Projects selected for digital jobs evaluation

	JF No.	Project	Location	Status
1.	JF1a	Project 1 - BPO	Gauteng	Completed
2.	JF8	Project 2 - BPO	KZN	Completed
3.	JF6	Project 3 - BPO	KZN	Completed
4.	JF2	Project 4 - ICT	Western Cape	Completed
5.	JF7a	Project 5 - ICT	Western Cape	Completed
6.	JF1b	Project 6 – Some BPO and ICT	Gauteng	Completed
7.	JF4	Project 7 – Some BPO and ICT	Gauteng	Completed
8.	JF7b	Project 8 - Some BPO and ICT	Gauteng	Completed

4.2.1 Project 1 (JF1a)

The project aimed to accelerate training for entry-level jobs within South Africa's growing Business Process Outsourcing (BPO) industry. The work readiness and training initiative prepared unemployed youth for successful placement in the business process outsourcing (BPO) industry. The model also involved selecting some of the youth candidates to be trained as a supervisor or team leader to assist the other young people on their training and placement journeys.

4.2.2 Project 2 (JF8)

The initiative aimed to implement an innovative value chain solution for youth skills development and employment in the BPO/Contact Centre and other Service-based industries in South Africa. The delivery model sourced, recruited, trained, and placed large groups of candidates into gainful and decent employment within 2-6 weeks. The model provided an ideal entry-level platform for inexperienced new labour market entrants.

4.2.3 Project 3 (JF6)

The project aimed to establish a contact centre in a township near Durban, in order to link underserved young people to training and employment opportunities. The model is a train-and-place initiative that recruits, trains and places within marginalised areas. Participants benefit from accredited training and job placement within a call centre. One of the key employment barriers faced by youth generally is the access to opportunities that are in the same vicinity to where they live. This initiative directly addresses this barrier as it has brought both the training and the placement opportunity into a marginalised area.

4.2.4 Project 4 (JF2)

The project offered training and internship programmes for unemployed graduates with information technology (IT) degrees. This training programme is equivalent to a postgraduate diploma in software development. The implementer conducts a rigorous sourcing, assessing and interview process before accepting applicants into the programme to ensure that the best candidates are trained in IT and workplace readiness. After training, the programme matches candidates with participating employers. The companies offer internships and employment to trainees.

4.2.5 Project 5 (JF7a)

Youth are trained in various ICT skills based on the demand from host companies and various research papers. Previously disadvantaged unemployed youth are targeted. These beneficiaries are trained in various SETA-accredited and NQF-aligned training including business and system analysis, and software development, including vendor-specific languages such as Java, .Net and IBM RPG. Beneficiaries are trained in network installations and infrastructure maintenance. Training programmes vary in duration and range between 6 months and 12 months. The beneficiaries are placed in roles including developer, software tester, analyst programmer, mobile developer, etc.

4.2.6 Project 6 (JF1b)

The project aimed to assist first-time job seekers by effectively matching them with suitable employers. Work seekers are assisted through personal development, skills enhancement and formal job placement. Employers are given access to previously inaccessible pools of talent – first-time employees with the skills and behaviour needed to meet the demands of entry-level roles.

4.2.7 Project 7 (JF4) *(This project is a scale-up of project 6).*

The project aimed to assist first-time job seekers by effectively matching them with suitable employers. Work seekers are assisted through personal development, skills enhancement and formal job placement. Employers are given access to previously inaccessible pools of talent – first-time employees with the skills and behaviour needed to meet the demands of entry-level roles.

4.2.8 Project 8 (JF7b)

The initiative aimed to test a pay-for-performance platform by leveraging. Investors pay upfront for activities relating to job placements. The Jobs Fund only pays for outcomes once a work-seeker has been placed in a long-term position. Placement involves higher-value jobs which do not essentially require a tertiary education to access. These placements are in a job family that is defined as medium-to-higher complexity based on JF Partner's categorisation of the Organising Framework for Occupations (OFO).

4.3 Specific Objectives

The evaluation will consider both the outcomes and the impact of the projects. The outcomes study (retrospective assessment of completed projects) is required to assess whether the outcomes of the completed projects' interventions made a difference on the target beneficiaries, the employers and the broader system.

Evaluators are required to assess each project:

- a. To better understand the potential for job creation in the digital sector *(relevance)*.
- b. To identify and assess project models that have been better able to respond to demand in the market for suitable labour *(effectiveness)*.
- c. To understand how successful projects were structured in terms of the partnerships required to ensure relevant training and placement of trained beneficiaries *(effectiveness and sustainability)*.
- d. To identify and assess barriers the projects have addressed, considering the constant existence of the huge unskilled youth labour pool *(relevance and effectiveness)*.
- e. To assess outcomes that manifested in the medium term (6-24 months) and the long-term *(impact)*.
- f. To assess whether the employment prospects of target beneficiaries have been improved following projects' interventions and assess their current employment statuses *(impact)*.
- g. To assess whether digital skills and work experience obtained by project beneficiaries have improved their employability in the broader labour market, i.e. assess whether the skills that were

built during the intervention were sufficient/broad enough for the beneficiaries to migrate to other sectors or were the skills not narrowly defined and so job specific that the beneficiaries could not use the skills elsewhere. *(effectiveness and impact)*.

- h. To determine the distribution of beneficiaries who gained digital skills across three groups of digital skill types (advanced, intermediate and basic digital skills) *(effectiveness)*.
- i. To determine common digital skills gaps among beneficiaries within relevant digital job types they are involved in *(relevance and effectiveness)*.
- j. To determine the distribution of placements secured across the three categories of digital job types (ICT-intensive jobs, ICT-dependent jobs, and ICT-enhanced jobs) *(effectiveness)*.
- k. To assess whether the income earnings of project beneficiaries have been improved *(impact)*.
- l. To assess how well the selected projects appropriately identified new demand for digital skills, and whether such demand was sustainable

4.4 Evaluation Questions

In line with the objectives stated above, the evaluation questions to be addressed for each project are as follows:

- a. What is the potential for job creation in the digital-sector? *(relevance)*.
- b. Which project models have been better able to respond to demand in the market for suitable labour, and what can be learnt from such projects? *(effectiveness and efficiency)*.
- c. What can be learnt regarding how successful projects were structured in terms of the partnerships needed to ensure proper training and placement of trained beneficiaries? *(relevance)*.
- d. What are the barriers to entry for some of the jobs, considering the continued existence of the huge unskilled youth labour pool? *(relevance)*.
- e. Which distal outcomes manifested in the medium term (6 to 24 months) in the long-term (more than 2 years) after closure of project interventions? *(effectiveness and impact)*.
- f. Have employment prospects of target beneficiaries been improved following project interventions, and what are their general current employment statuses? *(Impact)*
- g. Have the digital skills and work experience obtained by project beneficiaries improved their employability in the broader labour market, i.e. assess whether the skills that were built during the intervention were sufficient/broad enough for the beneficiaries to migrate to other sectors or were the skills not narrowly defined and so job specific that the beneficiaries could not use the skills elsewhere? *(Sustainability)*
- h. What is the distribution of secured placements across three groups of digital skill types (advanced, intermediate, and basic digital skills)? *(effectiveness)*
- i. What are the common digital skills gaps among beneficiaries within relevant digital job types they are involved in? *(relevance)*
- j. What is the distribution of job beneficiaries with respect to permanent and fixed-term contracts or placements across the three categories of digital job types (ICT-intensive jobs, ICT-dependent jobs, and ICT-enhanced jobs)? *(sustainability and effectiveness)*

- k. Have the income earnings of target beneficiaries been enhanced by the project? (*impact*).
- l. How well have these projects appropriately identified new demand for digital skills, and whether such demand was sustainable?

5 Significance of the Evaluation

As the global economy increasingly shifts towards a digital economy, it is becoming crucial for new labour market entrants, and those already employed, to improve their digital skills to ensure they remain relevant in the job market. Digital jobs have a unique capacity to employ individuals who face barriers to employment and limited employment opportunities or options in the economy⁹. In that regard, digital jobs can be harnessed to promote youth employment and contribute toward positive social outcomes for individuals and communities.

In addition, digital jobs help individuals in building transferable skill sets that make them resilient in the labour market and world of work by strengthening their future employment opportunities and enhancing their adaptability to the changing nature of the workplace. In that way, digital jobs can serve as a springboard to access jobs with higher pay, new professional development opportunities and enhanced personal development. Findings in this evaluation are expected to provide critical insights that shall be used in strategic decision-making about the funding of new projects in the sector as well as to inform policy making in respect of addressing unemployment, specifically youth unemployment.

6 Scope of the Services to be Provided

6.1 Desktop Review

This includes the collection, review and consolidation of:

- a. Relevant legislation, regulations and subject-matter literature.
- b. Current status of the digital economy, growth opportunities and future projections.
- c. Projects' documents.
- d. Projects' grant agreements.
- e. Projects' implementation plans.
- f. Quarterly or monthly performance reports.
- g. Financial and performance audits.
- h. Evaluations and case studies; and
- i. Other key public-financed youth employment interventions.

6.2 Primary Data Collection

It is envisaged that the service provider will undertake the following data collection activities:

⁹ Harji, K. and Best, H. (2013). Digital Jobs. Building Skills for the Future. Rockefeller Foundation.

- a. Conduct key informant interviews with, at a minimum:
 - I. Key projects' interventions stakeholders.
 - II. The Jobs Fund Project Managers.
 - III. Jobs Fund Partners.
 - IV. Other relevant government stakeholders; and
 - V. Key industry stakeholders.
- b. Survey a representative sample of beneficiaries from each project intervention.
- c. Design all evaluation instruments, as well as the data analysis plan.

It is expected that the service provider is well-versed in conducting primary and secondary research.

7 Expected Outputs

The following outputs are expected under this assignment:

- a. Inception report.
- b. Work plan and design document including evaluation approaches, methods, questions, analysis framework, data collection instruments and quality assurance plan.
- c. Draft report.
- d. Presentation of preliminary findings, lessons and good practice guidelines.
- e. Final evaluation report (with Executive Summary) that responds to the agreed learning questions incorporating feedback obtained from the presentation and draft report review comments.
- f. Appendices with details on the approaches, methods, informants, and data collection instruments; and
- g. A summary report covering the lessons learnt, good practice guidelines and policy recommendations.

7.1 Timelines and Milestones

The bidder is required to indicate proposed timelines for the milestones (see section 8.1). Presented below are the milestones envisaged for the evaluation. The specific details will need to be confirmed in negotiation with the Jobs Fund to ensure the timely completion of the evaluation and delivery of the evaluation report.

Table 5: Milestones

Activity	Deliverable*
Contract start date	Finalised and signed contract
Evaluation work plan and methodology	Inception report
Data collection	Cleaned data files from the field in appropriate file format (xlsx, , etc)
Data analysis and report writing	Draft evaluation report

Activity	Deliverable*
Presentation of a draft report	Presentation
Submission of (1) final evaluation report, and (2) summary report	Final evaluation report Summary report

8 Proposals

National Treasury (GTAC) reserves the right to appoint, and the service provider permits that previous employers and/or institutions may be contacted to obtain references regarding the expertise and general standard work.

Based on the brief outlined in the Terms of Reference, the service provider is requested to propose the approach to the evaluation. The ToR should serve as the basis, although enhancements to the brief will be welcomed if they are substantiated.

8.1 Proposal Structure

The proposal should include:

- Understanding of the Terms of Reference of the evaluation.
- Indication of the timelines for the deliverables, as outlined in Table 5.
- Approach, design and methodology for the evaluation.
- Activity-based plan (including effort for different researchers per activity and time frame linked to activities).
- Comprehensive output-based budget (in South African Rand, including VAT), indicating clearly costs of individual outputs.
- Key personnel (team members, roles and level of effort).
- Quality assurance plan (to ensure that the process and products are of good quality).

9 Key Personnel

Proposals should indicate the key personnel who will be directly involved in the work, together with their envisaged role. The relevant expertise of everyone to this assignment should be clearly outlined (full CVs are required).

9.1 Skills, Experience and Competencies

The evaluation company should have at least a 3-year track record in the evaluation of social protection, public employment and youth development programmes. An outline of the required skills, competencies and track record required for carrying out the scope of work outlined in this evaluation are suggested in the list below:

- Knowledge of publicly funded government initiatives, including challenge funds.
- Experience in researching and evaluating public-financed youth employment interventions.

- c. Experience in conducting evaluations in the digital economy.
- d. Understanding of economic and unemployment dynamics in South Africa.
- e. Key personnel to have a minimum of a 3-year-graduate degree or relevant experience in fields of labour economics, social protection, public employment and youth development, social science, and public policy and other relevant or equivalent qualifications.
- f. Proposals should indicate the key personnel who will be directly involved in the work, together with their envisaged role and time allocation. The relevant expertise of each individual to this assignment should be clearly outlined (full CVs are required).

10 Evaluation Phases/Methodology

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

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

Table 6: Evaluation Phases

Evaluation Stage	Description
Phase 1	<p>Administrative Compliance -</p> <p>A bidder is required to submit the administrative compliance documents as referred to in Table 10.1.1.</p> <p>Mandatory Compliance – Disqualification</p> <p>Failure to submit any of the required mandatory documents will lead to disqualification.</p>
Phase 2a: Desktop Evaluation	<p>Technical Evaluation</p> <p>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.</p> <p>The Technical proposal will be evaluated out of 100 points with a Threshold of 70 points.</p> <p>The Proposals will be assessed based on the Desktop evaluation criteria, and bidders that meet the minimum threshold of 70 points will be invited to participate in Stage 2: Interview evaluation.</p> <p><i>Bidders must note that submission of Annexures A (CV Template), and Annexure B (Price Proposal) in the prescribed formats is recommended.</i></p>

Phase 2b Interview Evaluation	<p>Bidders who meet the minimum threshold in Stage One will be invited to attend an interview, which will include a brief presentation on the background of the bidder, the team and the understanding of the assignment.</p> <p>Only bidders who meet the minimum threshold of 70 points will be considered for the Specific Goals evaluation.</p>
Phase 3	<p>Price and Specific Goals</p> <p>Preference points in the 80/20 formula will be awarded to bidders for attaining a score for Specific goals as indicated in <i>Table 11</i>. Bidders must provide the required information for evaluation purposes.</p>

It should be noted that the phases are separate processes and, as a result, the score from Stage One: Desktop Evaluation will not be used in Stage Two: Interview Evaluation to calculate a total overall score. These three phases are mutually exclusive and will be treated as such in the appraisal.

10.1 Phase One

10.1.1. Phase 1a: Administrative Compliance

During this phase, bid documents will be reviewed to determine compliance with tax matters and the Central Supplier Database (CSD) at the closing date and time of bid. 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 should result in a bid being disqualified immediately after the two days have lapsed.

Table 7: Bid requirements compilation and submission:

Document to be submitted	Requirement
Electronic submission: The bid proposal to be submitted to the relevant platform before closing date and time of the bid. The folders/files must be clearly marked and separated.	Electronic submission: Confirmation report to indicate all bid documents received on or before the closing date and time of the bid.
SBD 1- Invitation to Bid	Complete and sign the supplied pro forma document.
Central Supplier Database (CSD) Registration Report or CSD registration number or SARS pin	Bidders must be registered on the Central Database System (CSD) at the closing date and time of the bid.
SBD 3.3 – Pricing Schedule	Complete and sign the supplied pro forma document.

Document to be submitted	Requirement
Note: A bidder who fails to complete or does not submit the SBD 3 form will be disqualified without being granted an opportunity to submit a price.	
SBD 4 - Bidder's Disclosure (Refer to note below)	Complete and sign the supplied pro forma document
Note: Bidders must submit the attached 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: - "Person" means a bidder or supplier or shareholder, director, trustee, partner, or member of a bidder or supplier having the controlling interest in the bidder or supplier. - "State" means a national or provincial department, a national or provincial public entity or constitutional institution, a municipality or municipal entity, a provincial legislature or parliament	
SBD 6.1 - Preferential Point Claim form in terms of the Preferential Procurement Regulation (PPR) 2022	Complete and sign the supplied pro forma document. Failure to submit or fully complete SBD 6.1 form will result in the bidder forfeiting points for specific goals.
Prescribed CV templates	Completed and signed the supplied pro forma template.

Tax Clearance Status

A valid tax pin / Central Supplier Database (CSD) number must be provided for purposes of verifying that the tax matters of the bidder are in order. Where a consortium/joint venture/sub-contractor is involved each party to the association must submit a separate validation of Tax status and CSD registration number.

Bidder's tax matters must be compliant at the time of award. In the case where a bidder's tax matters are non-compliant, a bidder will be given a maximum of seven (7) working days to remedy the tax matters. Failure to remedy this will invalidate the bid.

10.1.2. Phase 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 the Central Supplier Database (CSD) on the closing date of the Request for Bid (RFB).
- Submission of a technical proposal is required.
- Submission of a price/financial proposal is required as per SBD 3.3.

- d. Any bidder representative (Director/Shareholder/Proposed Resource) who is employed by the state will not be considered. i.e., in the event that a bidder representative is in the employ of the state, such a bid proposal will not be considered.

10.2. Phase Two

10.2.1. Phase 2a: Desktop Evaluation

In addition to the proposal, the bidder is expected to submit the following:

Table 8: Submission Requirements

No.	SUBMISSION REQUIREMENTS (non-submission will lead to disqualification)
1.	Resource Matrix, clearly showing the role and qualification of each team member for the completion of the project (this must be in the Resource Matrix template provided).
2.	Team Experience Matrix, clearly showing the experience of proposed team members as per the stipulated requirements (this must be in the Team Experience template provided)
3.	Project schedule/timeline (to be provided as part of the bid documentation)

The Desktop Evaluation criteria are discussed in the table below:

Table 9: Evaluation Criteria

No.	EVALUATION CRITERIA	SCORING	WEIGHT
1.	<p>Demonstrated experience of the service provider to provide evaluation services in the development field</p> <p>This will be evaluated at the bidder firm level.</p>	<ul style="list-style-type: none"> 9+ years = 5 7 to 8 years = 4 5 to 6 years = 3 More than 3 to 4 years = 2 below 3 years = 1 No required/relevant experience demonstrated= 0 	20

No.	EVALUATION CRITERIA	SCORING	WEIGHT
2.	Project lead experience and expertise in carrying out evaluations, particularly in the development sphere.	<ul style="list-style-type: none"> • 9+ years = 5 • 7 to 8 years = 4 • 5 to 6 years = 3 • More than 3 to 4 years = 2 • Below 3 years = 1 • No required/relevant experience demonstrated= 0 	10
3.	Project team experience in public-financed youth employment interventions; Evaluation, Research and Analysis of the Digital Economy. The applicant is to propose a lead under each of the 4 broad areas and the leads will be evaluated as per the below. These team members must be clearly marked in the proposal. List projects undertaken which are cross-referenced in the proposal, team experience matrix, and CVs of individual members. Minimum of 3 references.		
a.	Broad Area 1: Experience working with and/or evaluating challenge fund(s) and active labour market interventions. This will be based on the subject-matter lead proposed by the service provider. This individual must be clearly marked in the proposal.	<ul style="list-style-type: none"> • 9+ years = 5 • 7 to 8 years = 4 • 5 to 6 years = 3 • More than 3 to 4 years = 2 • <below 3 years = 1 • No required/relevant experience demonstrated= 0 	10
b.	Broad Area 2: Experience working in youth development in its broadest sense (i.e. the stages that all children go through to acquire the attitudes, competencies, values, and social skills they need to become successful adults). This will be based on the subject-matter lead proposed by the service provider. This individual must be clearly marked in the proposal.	<ul style="list-style-type: none"> • 9+ years = 5 • 7 to 8 years = 4 • 5 to 6 years = 3 • More than 3 to 4 years = 2 • <below 3 years = 1 • No required/relevant experience demonstrated= 0 	5

No.	EVALUATION CRITERIA	SCORING	WEIGHT
c.	<p>Broad Area 3: Experience conducting evaluations using a variety of methods.</p> <p>This will be based on the subject-matter lead proposed by the service provider. This individual must be clearly marked in the proposal.</p>	<ul style="list-style-type: none"> 9+ years = 5 7 to 8 years = 4 5 to 6 years = 3 More than 3 to 4 years = 2 Below 3 years = 1 No required/relevant experience demonstrated= 0 	10
d.	<p>Broad Area 4: Experience in the Digital Economy.</p> <p>This will be based on the subject-matter lead proposed by the service provider. This individual must be clearly marked in the proposal.</p>	<ul style="list-style-type: none"> 9+ years = 5 7 to 8 years = 4 5 to 6 years = 3 More than 3 to 4 years = 2 Below 3 years = 1 No required/relevant experience demonstrated= 0 	20
4.	<p>Approach: Relevance, quality and creativity of the technical approach to the research study.</p>	<ul style="list-style-type: none"> 5 = Excellent (Analyses/Studies/Dissemination directly responds to the ToR, is plausible [considering the timeline and proposed expertise], offers novel and practical ideas, and is likely to significantly exceed expectations) 4 = Good (Analyses/Studies/Dissemination responds to the ToR, is plausible [considering the timeline and proposed expertise], and is likely to exceed expectations) 3 = Average (Analyses/Studies/Dissemination responds to the ToR; is plausible [considering the timeline and proposed expertise], and will meet expectations) 2 = Below Average (Analyses/Studies/Dissemination only responds in part to the ToR, is implausible [considering the timeline and proposed expertise], and is unlikely to meet expectations) 	25

No.	EVALUATION CRITERIA	SCORING	WEIGHT
		<ul style="list-style-type: none"> 1 = Poor (Analyses/Studies/ Dissemination does not respond to the ToR; is implausible [considering the timeline and proposed expertise], and will not meet expectations) 0 = Non-submission/demonstration of the submission of Relevance, quality and creativity technical approach to the research study. 	
Total			100
Total Technical Minimum Threshold to proceed to the interview stage			70

Failure to meet a minimum threshold of 70 points for desktop evaluation will result in the disqualification of the bidder.

The service providers that achieve the minimum threshold in Phase 2a: Desktop evaluation will be called for an interview.

10.2.2. Phase 2b: Interview Evaluation

Those bidders who meet the minimum threshold in Stage One will attend an interview, which will include delivering a presentation to the evaluation panel. This process will be used to verify the following:

Table 10: Interview Evaluation Criteria

NO	EVALUATION CRITERIA	GUIDELINES FOR CRITERIA APPLICATION	WEIGHT
	Demonstration of knowledge and skills	5 = Excellent (Demonstrated capability is significantly above the expected capability level) 4 = Good (Demonstrated capability exceeds the expected capability level) 3 = Average (Demonstrated capability meets the expected capability level) 2 = Below Average (Demonstrated capability is below the expected capability level) 1 = Poor (Demonstrated capability is significantly below the expected capability level)	40

NO	EVALUATION CRITERIA	GUIDELINES FOR CRITERIA APPLICATION	WEIGHT
	Demonstration of the understanding of the ToR and responsiveness of the proposal to the ToR	5 = Excellent (Demonstrated capability is significantly above the expected capability level) 4 = Good (Demonstrated capability exceeds the expected capability level) 3 = Average (Demonstrated capability meets the expected capability level) 2 = Below Average (Demonstrated capability is below the expected capability level) 1 = Poor (Demonstrated capability is significantly below the expected capability level)	60
Total score			100
Minimum threshold			70

Failure to meet a minimum total interview threshold of 70 points will result in the disqualification of the bidder.

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

10.3 Phase 3: Price and Specific Goals Evaluation

Table 11: Price and Specific Goals Evaluation Criteria

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

The CSD report shall be used as evidence to confirm/award points for specific goals. It is the responsibility of the bidding entity to ensure that the information on the CSD is updated and accurate.

11 Financial Implications

The service provider will be required to attend meetings virtually, when deemed necessary by the Jobs Fund. The quotation should be inclusive of all travel-related costs to the sites.

All quotations would need to specify the deliverables to be completed, time allocated to each deliverable and cost implications (please include price proposal as per SBD 3.3).

12 Contracting Authority

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

13 Other Bid Conditions

- a. Prior to the appointment, the recommended service provider may be required to submit additional supporting documentation.
- b. GTAC reserves the right to negotiate the final offer with the recommended bidder before the award.

14 BID VALIDITY PERIOD

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

15 LEGAL IMPLICATIONS

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

16 CLARIFICATIONS

- a) Requests for clarification must be made in writing by e-mail to psp@gtac.gov.za.
- b) Requests for clarification will be accepted by GTAC as specified in the bid document. The submission reference must be included in the subject line of the email.
- c) Telephonic enquiries for clarification will not be accepted. Bidders must reduce all enquiries to writing.

17 COMMUNICATION

Professional Services Procurement (PSP) within GTAC will communicate with bidders where bid clarity is sought, or to obtain information or to extend the validity period.

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

18 COUNTER CONDITIONS

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

19 PROHIBITION OF RESTRICTIVE PRACTICES

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

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

20 BENEFICIAL OWNERSHIP

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

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

21 SUBMISSION DETAILS

Bidders to note that only electronic submission is allowed for this bid using the GTAC Vendor Portal, available on the link provided below:

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

Bidders are required to first register on the GTAC Vendor Portal and then login to the portal to access the tender.

The registration process involves the following steps:

- a) Register as a portal user. This is the process of creating a user account on the vendor portal. This will allow the user to view and respond to tenders.
- b) Register your supplier details. Registering your company details will allow you as the supplier to upload relevant information and documents. Supplier details must be captured in order to receive a vendor or supplier number, and will then be eligible to respond to tenders.

To respond to this tender, suppliers should login to the portal and navigate to the tender menu then select "Formal" then click on "Current". This will provide a list of the available tenders.

Bidders can select this tender (reference TEN0000031) to start the submission process.

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

NB: Do not submit hardcopy bids to GTAC or the Tender Information Centre (TIC). Submissions received after the closing date and time will not be accepted.