



National Treasury  
REPUBLIC OF SOUTH AFRICA

## TERMS OF REFERENCE

**A company to provide capacity to the Jobs Fund during funding rounds**

### Programme Identification

Name of Client	The Jobs Fund
Project Reference Number	PN558
Name of Project	A company to provide capacity to the Jobs Fund during funding rounds over 18 months
Contracting Authority	Government Technical Advisory Centre (GTAC), National Treasury
Accountable Officer	Ms. Najwah Allie-Edries
Project Purpose	To provide additional capacity to the Jobs Fund during funding rounds

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Najwah Allie-Edries

Deputy Director General: Employment Facilitation

Date: 9 May 2025 .....

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## **1 REQUEST FOR PROPOSAL**

Suitably qualified service providers are invited to respond to this Terms of Reference (ToR) for provision of a team of experts to appraise, assist with the financial structuring of projects, contracting, and oversee the implementation of projects over an 18-month period post approval of the projects. The service provider must put forward appropriately qualified and suited individual/s with relevant experience to fulfil the requirements.

## **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 key component of the programme is the Jobs Fund, a multi-year R9 billion investment that leverages complementary funding from public and private sector project partners. The objective of the Fund is to co-finance innovative public and private sector initiatives that significantly contribute to job creation. The 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.

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 private, public, and non-governmental sectors during calls for proposals. Project partners are required to share both risk and costs by matching the grant fund allocation as specified in the term sheet, 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 scaling job creation.

### **2.2 Need for a team of experts**

The Jobs Fund will be opening funding rounds that will prioritise the Informal Economy and, Green Economies as well as the Just Energy Transition.

The Jobs Fund requires additional resources to assist with the appraisal, financial structuring of projects, contracting and the commencement of implementation of projects.

### **2.3 Scope of services required**

The purpose of this Terms of Reference is to secure a team of experts able to dedicate time to the appraisal of applications, financial structuring of projects, contracting and overseeing the commencement of project implementation. In addition, the Jobs Fund requires sector expertise to provide technical guidance in the following areas:

- Green Economy,
- Informal Economy, and
- Just Energy Transition.

**Table 1: Technical and Financial Support to be provided in the review of project applications**

Area	Number	Description
Technical Financial Support on Projects	1	Appraise new investment proposals (due diligence) and opportunities submitted through the Calls for Proposals
	2	Conduct and collate research related to the funding round focus areas and applications
	3	Determine the funding gap in the application including: <ul style="list-style-type: none"> <li>▪ Determining standardised costs across job creation models</li> <li>▪ optimal grant allocation and funding structure to ensure value for money.</li> </ul>
	4	Conduct commercial analysis, risk analysis and institutional analysis of applications
	5	Review theory of change/project logic and the formulation of the Activity Based, Costed Project Implementation Monitoring Plan (ABC PIMP)
	6	Prepare appraisal reports for submission to governance committees
	7	Review proposed contracts for adherence to Jobs Fund policy, existing laws and regulations
	8	Support Jobs Fund staff in interpreting finance-related legislation and directives and alignment with JF Operating Procedures
	9	Support the Jobs Fund with post-investment monitoring and evaluation

**Table 2: Technical Expertise required on the Green Economy and Just Energy Transition**

Area	Number	Description
Technical guidance and support in the areas of the Green Economy and Just Energy Transition	1	Sustainable Development – Understanding policies and practices that promote economic growth while protecting the environment and ensuring social equity.
	2	Renewable Energy – Knowledge of the solar, wind, hydro, and other renewable energy value chains, as well as energy efficiency and the transition from fossil fuels with a view to identifying opportunities for SMME development and inclusion.
	3	Circular Economy – Expertise in waste reduction, recycling, sustainable production, and responsible consumption.

Area	Number	Description
	4	Green Finance & Investment – Insight into sustainable finance mechanisms, ESG (Environmental, Social, and Governance) investing, carbon markets, and green bonds.
	5	Climate Change & Carbon Reduction – Knowledge of approaches for reducing carbon emissions, adaptation and mitigation measures, and compliance with international climate agreements like the Paris Accord.
	6	Sustainable Agriculture & Food Systems – Promoting organic farming, reducing food waste, and ensuring sustainable supply chains.
	7	Eco-Friendly Infrastructure & Urban Planning – Green buildings, smart cities, and sustainable transportation systems.
	8	Environmental Policy & Governance – Knowledge of environmental laws, regulations, and global frameworks for sustainability.
	9	Corporate Sustainability & ESG Compliance – Helping businesses implement sustainable practices and report on ESG performance.
	10	Green Jobs & Workforce Transition – Understanding the impact of the green economy on employment and strategies for reskilling workers in traditional industries.

**Table 3: Technical Expertise required on the Informal Economy**

Area	Number	Description
Technical guidance and support on the Informal Economy	1	Understanding of the Economic Contribution, Structure, Entrepreneurship and Employment in the sector.
	2	Local Economic Development, Employment & Livelihoods – Understanding job creation, working conditions, and income security and building township economies.
	3	Legal & Regulatory Framework – Understanding policies, regulations that impact the informal sector and strategies to address formalisation challenges.
	4	Access to Finance – Understanding barriers to credit, microfinance, and informal savings mechanisms like stokvels, design of appropriate financing mechanisms and strategies to address financial barriers.
	5	Social Protection & Worker Rights – Understanding Healthcare, social security, and labour rights for informal workers and strategies to address these challenges.

Area	Number	Description
	6	Gender & Informal Work – Understanding women’s role in the sector, income disparities, and gender-based challenges and strategies to address these challenges.
	7	Street Vendors & Informal Trade – Understanding of urban policies, public space conflicts, and municipal regulations and strategies to support informal traders.
	8	Digital & Technological Integration – Understanding the impact of mobile banking, e-commerce, and social media on informal businesses and strategies to support the sector to leverage technology.
	9	Resilience & Crisis Response – Insight into strategies to support the informal sector to adapt to economic shocks and global crises.
	10	Linkages with the Formal Economy – Insight into value chain, supply chain integration for informal sector businesses, structuring business partnerships, and pathways to formalisation.

## 2.4 Required Expertise and Experience

### 2.4.1 Investment / Financial Experts

#### 2.4.1.1 The following investment and financial expertise and experience are being sought to:

- i. Assist with the appraisal, financial structuring of applications, contracting and overseeing the commencement of implementation of projects over 18 months.
- ii. Assist with financial analysis of project applications across various economic sectors.
- iii. The team may comprise of individuals with a range of experience preferably 6 - 8 years’ and a solid track record of working with economic development programmes in respect of undertaking:
  - a. appraisals of funding applications;
  - b. financial structuring;
  - c. research and market analysis;
  - d. contracting of approved projects; and
  - e. post-investment monitoring of projects.
- iv. The Jobs Fund’s preference is for a service provider to offer a team of suitably qualified and experienced members ranging between 2 and 8 members.

#### 2.4.1.2 Qualifications for Financial Experts:

Preferably a Bachelor’s Degree/Advanced Diploma (NQF 7) in the following fields of study:

- a. Development Finance;
- b. Economics;
- c. Investment Management;
- d. Financial Management;
- e. Business Management;
- f. Accounting and
- g. Related commerce fields (e.g. Information Systems, Statistics, etc).

NOTE: Copies of qualifications in the relevant field as mentioned above, as well as a South African Qualifications Authority (“SAQA”) certificate, are to be provided (where qualifications are obtained outside the borders of South Africa). The Bidder may be requested to provide certified copies of certificates before the award is made.

## **2.4.2 Sector Experts**

### **2.4.2.1 The following sector experts are sought:**

- i. The Jobs Fund requires additional sector experts over 18 months.
- ii. A team consisting of a minimum of two (2) up to five (5) suitably qualified and experienced members.
  - a. Each member should preferably have 5 - 6 years’ experience and a track record working in the following areas:
  - b. Green Economy and Just Energy Transition; and
  - c. Informal Sector.

### **2.4.2.2 Qualifications for Sector Experts:**

Preferably a Bachelor’s degree/Advanced Diploma (NQF 7) in the following fields of study:

- a. Environmental Science;
- b. Economics and Business Management;
- c. Sustainable Development;
- d. Energy Studies;
- e. Public Policy;
- f. Engineering (including Energy, Renewable Energy, or Environmental);
- g. Finance, including green finance and sustainable investment;
- h. Development Studies;
- i. Sociology; and
- j. Urban & Regional Planning.

NOTE: Copies of qualifications in the relevant field as mentioned above, as well as a South African Qualifications Authority (“SAQA”) certificate, are to be provided (where qualifications are obtained outside the borders of South Africa). The Bidder may be requested to provide certified copies of certificates before the award is made.

### 3 REPORTING

The successful service provider will report to the Project Director in the Jobs Fund.

#### 3.1 Geographical Area

The Jobs Fund is based in Centurion, but remote working will be supported.

#### 3.2 Facilities to be Provided by the Service Provider and Jobs Fund

The Jobs Fund will provide, where necessary, office facilities including telecommunications and stationery and administrative support as required.

Additionally, the Jobs Fund will arrange and pay for all travel and accommodation arrangements that may be required for project visits.

The Service Provider will be expected to provide all tools of trade.

#### 3.3 Sub-Contracting

The work that the service provider will be contracted to do shall not be sub-contracted.

#### 3.4 Performance

- i. Performance will be reviewed by the Jobs Fund during the delivery of the project work.
- ii. Should performance be below the required standard, or should funds not be available, the contract may be terminated before the contract period is completed.

### 4 CONTRACT PERIOD

- i. The contract shall be for a period of eighteen (18) months.

### 5 REMUNERATION AND LEVEL OF EFFORT

- i. The approved bidder shall be remunerated per deliverable and not time spent on a deliverable. The time taken to appraise a project through the different stages will be agreed upon between the Jobs Fund and the winning bidder. The agreed fee and deliverables will be agreed upon in a document (instruction to perform work – IPW).
- ii. The maximum level of effort required for the duration of the 18 months will be 7 200 hours in total for all resources. Resources are expected to allocate approximately 20% of their time over the 18 months.

### 6 EVALUATION PHASES/METHODOLOGY

**Table 4: Evaluation Phases**

Evaluation Stage	Description
Phase 1	<b>Administrative Compliance</b>  A bidder is required to submit the administrative compliance documents as referred to in paragraph 6.1.1. and 6.1.2.

Evaluation Stage	Description
	<b>Mandatory Compliance – Disqualification</b>  Failure to submit any of the required mandatory documents will lead to disqualification.
Phase 2	<b>Technical Evaluation: Desktop Evaluation</b>  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 points with a Threshold of <b>70 points</b> .  Only bidders who meet the threshold will be considered for the Specific Goals evaluation.  <i><b>Bidders must note that submission of Annexures A (Team Experience matrix), and Annexure B (Resource Matrix) in the prescribed formats is recommended.</b></i>
Phase 3	<b>Price and Specific Goals</b>  Preference points in the 80/20 formula will be awarded to bidders for attaining a score for Specific goals as indicated in Table 8. Bidders must provide the required information for evaluation purposes.

It should be noted that the stages are considered to be separate processes and are mutually exclusive.

### 6.1 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 5: Bid requirements:**

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.

Document to be submitted	Requirement
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 <b>must</b> 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.
<b>Note:</b> 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
<b>Note:</b> 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 will result in the bidder forfeiting points for specific goals.
Prescribed CV templates	Complete and sign 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 consortium/joint ventures/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.

### 6.2 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:

- a. Bidders must be registered on the Central Supplier Database (CSD) on the closing date of the Request for Bid (RFB).
- b. Submission of a technical proposal is required.
- c. 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.

### 6.3 Phase 2: Desktop Evaluation

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

**Table 6: Submission Requirements**

No.	SUBMISSION REQUIREMENTS
1.	Company profile, which stipulates experience in providing expertise within the development finance field. Provide details of projects completed.
2.	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).
3.	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)

The Desktop Evaluation criteria are discussed in Table 7 below:

**Table 7: Evaluation Criteria**

Evaluation Criteria	Weight	Scoring Criteria
<b>1. Company Track Record</b>		
a) Company Profile Demonstrated experience of the service provider to provide expertise in the development finance field.  <i>This will be evaluated at the bidder firm level, and information to be provided in line with the submission requirements (Table 6)</i>	20 points	<ul style="list-style-type: none"> <li>• 5 = 9+ years</li> <li>• 4 = 7 to 8 years</li> <li>• 3 = 5 to 6 years</li> <li>• 2 = 3 to 4 years</li> <li>• 1 = &lt; 3 years</li> <li>• 0 = No required/relevant experience demonstrated</li> </ul>
<b>2. Investment / Financial Experts</b>		

Evaluation Criteria	Weight	Scoring Criteria
<p>a) Qualifications of Financial Experts</p> <p>Highest Qualification in one of the following areas:</p> <ul style="list-style-type: none"> <li>○ Development Finance;</li> <li>○ Economics;</li> <li>○ Investment Management;</li> <li>○ Financial Management;</li> <li>○ Business Management;</li> <li>○ Accounting and</li> <li>○ Related commerce fields.</li> </ul> <p><i>(Note: if the qualification is from an institution outside South Africa, applicants are to submit a copy of the certificate from the South African Qualifications Authority (SAQA)</i></p> <p><i>During the evaluation of bids, an average score will be used for the proposed team of financial experts (2 – 8 experts)</i></p>	15%	<ul style="list-style-type: none"> <li>• 5 = Post Graduate qualification (NQF 8)</li> <li>• 4 = Bachelor's degree or Advanced Diploma (NQF 7)</li> <li>• 3 = Diploma or Advanced Certificate (NQF 6)</li> <li>• 2 = Higher Certificate (NQF 5)</li> <li>• 1 = National Certificate (NQF 4)</li> <li>• 0 = Non-submission of copies of qualifications, SAQA certification (in the case of a foreign qualification), and where qualifications don't align with the fields of study listed in the criteria.</li> </ul>
<p>b ) Experience of Investment / Financial Experts</p> <p>Experience in the following areas:</p> <ul style="list-style-type: none"> <li>○ Appraisal of applications for funding,</li> <li>○ financial structuring of projects,</li> <li>○ Research and market analysis</li> <li>○ managing the contracting process for the projects approved for grant funding</li> <li>○ implementation of development projects</li> </ul> <p><i>Experience to be derived from CV and <u>Annexure A</u> i.e. clearly outline relevant project/experience in your CV and <u>Annexure A</u></i></p> <p><i>During the evaluation of bids, an average score will be used for the proposed team of financial experts (2 – 8 experts)</i></p>	25 points	<ul style="list-style-type: none"> <li>• 5 = 8 years and above experience per specific area</li> <li>• 4 = more than 6 years less than 8 years' experience per specific area</li> <li>• 3 = 4 to less than 6 years' experience per specific area</li> <li>• 2 = more than 2 to less than 4 years' experience per specific area</li> <li>• 1 = less than 2 years' experience per specific area</li> <li>• 0 = No experience per specific area</li> </ul>
<b>3. Sector Experts</b>		
<p>a) Qualification of Sector Experts</p> <p>Highest Qualification in one of the following areas:</p> <ul style="list-style-type: none"> <li>○ Environmental Science;</li> <li>○ Economics and Business Management;</li> </ul>	15 points	<ul style="list-style-type: none"> <li>• 5 = Post Graduate qualification (NQF 8)</li> <li>• 4 = Bachelor's Degree or Advanced Diploma (NQF 7)</li> </ul>



Evaluation Criteria	Weight	Scoring Criteria
<ul style="list-style-type: none"> <li>○ Sustainable Development;</li> <li>○ Energy Studies;</li> <li>○ Public Policy;</li> <li>○ Engineering (including Energy, Renewable Energy, or Environmental);</li> <li>○ Finance, including green finance and sustainable investment;</li> <li>○ Development Studies;</li> <li>○ Sociology; and</li> <li>○ Urban &amp; Regional Planning.</li> </ul> <p><i>(Note: if the qualification is from an institution outside South Africa, applicants are to submit a copy of the certificate from the South African Qualifications Authority (SAQA)</i></p> <p><i>During the evaluation of bids, an average score will be used for the proposed team of financial experts (2 – 5 experts)</i></p>		<ul style="list-style-type: none"> <li>• 3 = Diploma or Advanced Certificate (NQF 6)</li> <li>• 2 = Higher Certificate (NQF 5)</li> <li>• 1 = National Certificate (NQF 4)</li> <li>• 0 = Non-submission of copies of qualifications, SAQA certification (in the case of a foreign qualification), and where qualifications don't align with the fields of study listed in the criteria.</li> </ul>
<p>b) Experience of Sector Experts</p> <p>Experience in the following areas:</p> <ul style="list-style-type: none"> <li>○ Green Economy</li> <li>○ Just Energy Transition</li> <li>○ Informal Sector</li> </ul> <p><i>Experience to be derived from CV and <u>Annexure A</u> i.e. clearly outline relevant project/experience in your CV and <u>Annexure A</u></i></p> <p><i>During the evaluation of bids, an average score will be used for the proposed team of financial experts (2 – 5 experts)</i></p> <ul style="list-style-type: none"> <li>•</li> </ul>	25 points	<ul style="list-style-type: none"> <li>• 5 = more than 6 years and above experience per specific area</li> <li>• 4 = more than 5 to less than 6 years' experience per specific area</li> <li>• 3 = more than 4 to less than 5 years' experience per specific area</li> <li>• 2 = more than 3 years to less than 4 years' experience per specific area</li> <li>• 1 = more than 2 to less than 3 years' experience per specific area</li> <li>• 0 = less than 2 year' experience per specific area</li> </ul>
<b>Total</b>	<b>100 points</b>	
<b>Minimum threshold</b>	<b>70 points</b>	

The service providers that achieve the minimum threshold in Stage Two will be considered for the next stage. Failure to meet the threshold score of **70 points** will result in the disqualification of the bidder.

#### 6.4 Phase 3: Price and Specific Goals Evaluation

- a. Preferential Procurement Evaluation will be based on the 80/20 principle.
- b. The applicable formula (80/20) will be utilised to evaluate the bid, of which eighty (80) points are allocated for the price as allocated in the enclosed form SBD 6.1. that must be completed, and the remaining twenty (20) points are allocated for the specific goals as indicated in table 8 below.
- c. Submission of a price proposal is required in the proforma format. (SBD 3.3). Bidders need to provide cost per output, inclusive of VAT.
- d. **GTAC reserves the right to negotiate the price offer or rates with the recommended bidder(s).**

**Table 8: Price and Specific Goals Evaluation Criteria**

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

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

**Table 9: Definitions**

<u>Terminology</u>	<u>Definition</u>
<b>“Specific Goals”</b>	means specific goals as contemplated in section 2(1)(d) of the Act which may include contracting with persons, or categories of persons, historically disadvantaged by unfair discrimination on the basis of race, gender and disability including the implementation of programmes of the Reconstruction and Development Programme as published in <i>Government Gazette</i> No. 16085 dated 23 November 1994;

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

## 7 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).

## 8 CONTRACTING AUTHORITY

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

## 9 OTHER BID CONDITIONS

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

## 10 BID VALIDITY PERIOD

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

## 11 LEGAL IMPLICATIONS

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

## 12 CLARIFICATIONS

- a) Requests for clarification must be made in writing by e-mail to [psp@gtac.gov.za](mailto: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.

## 13 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.

## 14 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.

## 15 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.

## 16 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

## 17 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 TEN0000000041) 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.**

## 18 ANNEXURE A: Experience Matrix

Service Provider Name: <add>

RFP Reference: PN558

Add rows where necessary.

#	Name of Team Member	Role in Project	List Key Capability Area (As per the ToR)	Reference Experience in Key Capability Areas (Reference specific projects they have worked on)	Duration of Experience for each Project (In months)	Reference (List name, organisation, contact number, and email address)
1	E.g.: Thandi Sithole	E.g.: Investment Officer	1. Evaluation Criteria 2b (Undertaking Appraisals)	1. Worked as Programme Director at the XYZ Challenge Fund in Kenya. Core responsibilities included appraisal of potential projects	36 months	Mr Zamile Ndlovu, XYZ Challenge Fund Director, Tel: xxxxxxxx; email address: xxxxxxxx
				2. Project lead on the ABC Challenge Fund in Pakistan. Core responsibilities included...	8 months	Ms Catherine Gregory, Evaluation Specialist for ABC Challenge Fund, Tel: xxxxxxxx; email address: xxxxxxxx
			2. Evaluation Criteria 2b (Research and Market Analysis)	1. Conducted Research on development sectors in Africa	24 months	Jacob Dube, Head of Research Knightsworth, Tel: xxxxxxxxxx; email address: xxxxxxxxxx
				2. Conducted market analysis for consultancy ...	14 months	Dr Theresa Naidoo, Programme Director YWP and Partners, Tel: xxxxxxxx; email address: xxxxxxxx
				3.		
			3.	1.		
				2.		
				3.		
			4.	1.		

#	Name of Team Member	Role in Project	List Key Capability Area (As per the ToR)	Reference Experience in Key Capability Areas (Reference specific projects they have worked on)	Duration of Experience for each Project (In months)	Reference (List name, organisation, contact number, and email address)
2				2.		
				3.		
				1.		
				2.		
				3.		
				1.		
				2.		
				3.		
				1.		
				2.		
				3.		
				1.		
				2.		
				3.		

## 19 ANNEXURE B - RESOURCE MATRIX TEMPLATE

Service Provider Name: <add>

RFP Reference: PN558

This matrix will highlight the anticipated number of workdays for the project per resource.

<u>Name of Team Member</u>	<u>Skills</u>	<u>Number of Hours</u>
1. <u>Thandi Smith</u>	<u>E.g. Social Impact Investment; Green economy / Just Energy Transition (as per section 3 of Terms of</u>	<u>E.g., 400 hours</u>
2.		
3.		
4.		
5.		