

Title of Procurement	Quarterly updates of the Budgets in Africa (BiA) Budget Enquirer tool on CABRI PFM Knowledge Hub
Duration	May 2024 – January 2025
Location:	Centurion, Gauteng, South Africa / Remote
Deadline for submissions	8 May 2024

Background

The Collaborative Africa Budget Reform Initiative (CABRI) is an intergovernmental organisation that provides support to African budget officials and public financial management (PFM) practitioners in developing and implementing functional approaches to reform initiatives, to strengthen their public financial management systems. CABRI provides a platform for member countries to exchange experiences and learn from each other in an environment that fosters a common understanding of shared problems in PFM reforms.

The [PFM Knowledge Hub](#) is CABRI's online platform for sharing budgeting practices and policies, challenges and PFM reform efforts. CABRI uses the PFM Knowledge Hub to disseminate its core products, such as reports, case studies, policy briefs, blogs, events and newsletters. A key element of the PFM Knowledge Hub is the [Budget Enquirer](#), a search tool that allows users to navigate through a repository of budget information for African central governments. CABRI has collected budget documentation of 54 African countries since 2010. This repository of national budget documents allows the public finance community and practitioners to use and benefit from the information, compare and contrast budget documentation and policies, encouraging greater transparency on the continent. This pool of information also allows CABRI to build an evidence base of African budgets and to undertake analysis on trends, patterns and differences in budget transparency practices and fiscal policy across the continent.

Objective of the assignment

CABRI is seeking a service provider to assist in updating and refining the Budget Enquirer by sourcing, collating, categorising and indexing national budget documents and selecting consolidated sub-national budget documentation. This will be done for all documents published between April 2021 and December 2024. The indexed documentation will be provided to an IT service provider for upload onto the PFM Knowledge Hub.

It is expected that the retrospective update will take approximately 20 days as the service provider will look for multiple documents in a single search per country. Subsequent quarterly updates are expected to take approximately 7 days. This implies that a **maximum of 45 days** is envisaged for this work.

ESTABLISHMENT OF THE SHORTLIST

A shortlist of bidders will be established at the end this process. The submissions will be judged on the following criteria based on their submitted information.

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CRITERIA	POINTS
1. General academic qualifications and adequacy for the proposed assignment <i>Curriculum Vitae (CV) with the list of qualifications and Certified copies of qualifications</i>	30
2. Similar experience in the area of expertise of the assignment as described <i>CV and Project Proposal</i>	30
3. Similar experience in the PFM-related data platform and/or other data hosting and content update specific function <i>CV with details of projects, project owners and references</i>	20
4. Experience with CABRI, other international organisation or similar work <i>CV with list of organisations and references</i>	10
5. Value for money <i>Project Proposal with Proposed Activities and Costs</i>	10
TOTAL	100

Interested candidates /institutions must submit their applications via e-mail:

procurementDS@cabri-sbo.org

Deadline for submissions is **8 May 2024**. No late submissions will be accepted.

Enquiries only can be sent via e-mail: danielle.serebro@cabri-sbo.org



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Quarterly updates of the Budgets in Africa (BiA) Budget Enquirer tool on CABRI PFM Knowledge Hub

1. SCOPE OF WORK

Process and tasks required of the service provider

The service provider will be responsible for updating the Budget Enquirer retrospectively from April 2021 until present. This is expected to require 35 days of work. The service provider will be required to:

1. Identify and collect national and select sub-national budget documentation of all African Union Member States, through Ministry of Finance, Auditor General, Parliament and other government websites as well as internet searches.

1.1. Period of the budget documents:

Budget documentation of all AU Member States, since April 2021 until December 2024.

1.2. Types of budget documents:

Publicly available budget documents, that relate to the budget formulation, approval, execution and oversight phases of the budget cycle, as well as legislature. These documents may be available on the internet, however where they are not, the service provider will be requested to establish contact with the ministry of finance officials and request these at the relevant point in the budget cycle. This will apply to CABRI member countries and select key partner countries. Details of officials will be provided by CABRI.

The table below presents a non-exhaustive list of documents to be collected.

Budget cycle	External document	Internal document
Formulation	Pre-budget statement Executive’s Budget Proposal Budget speeches Fiscal/macro policy frameworks Medium-term expenditure frameworks Estimates of national expenditure Budget books	Budget call circulars Treasury guidelines Budget calendars
Approval	Enacted Budget Adjusted and supplementary budgets Citizen’s Budget Parliamentarians’ report	
Execution	In-year reports Mid-year reports Year-end reports	
Oversight	Audited financial statements Audit reports (consolidated)	



Legislation	Updates to public finance legislation including PFMA, procurement act, etc.	
Other	National plans Debt strategies Annual debt bulletin	Long-term reports Risk reports

Other relevant documents to be considered and approved before uploading.

2. **Organisation, categorisation and indexing** of government budget information, based on an indexing system developed by the CABRI team.
3. **Update of existing country profiles** of all countries, consisting of around 20 key socioeconomic and macroeconomic indicators to be determined in consultation with the service provider.
4. **Update of existing matrixes of information accessibility** for 54 African countries. The matrix of information accessibility allows CABRI to develop time series data on country budget information accessibility online over time, and to monitor progress by countries in transparency. See the Annexure for country matrix.

2. PERIOD OF ASSIGNMENT

The present project is envisaged to run over 10 months, with strong potential for annual renewal. The contract duration will run from 20 May 2024 to 31 January 2024. It is expected that approximately 45 days is required for completing this work. The assignment will be undertaken in line with the following actual deliverables and guiding timelines:

Deliverables	Date
<ul style="list-style-type: none"> • Inception report including proposed revisions to methodology 	25 May 2024 (2 input days)
<ul style="list-style-type: none"> • Updated database of budget documents of all AU member states April 2021 to April 2024 <ul style="list-style-type: none"> ○ Flat database of budget documents ○ Filed database of budget documents • Updated excel spreadsheet of all countries <ul style="list-style-type: none"> ○ Indexing of budget documents ○ Country profiles • Matrix of accessibility of budget documents of all countries • A source protocol document, for the countries in the PFM knowledge hub to indicate the main sources/links of information for collection. 	30 June 2024 (20 input days)
<ul style="list-style-type: none"> • Database of budget documents of all AU member states May to June 2024 <ul style="list-style-type: none"> ○ Flat database of budget documents ○ Filed database of budget documents • Updated excel spreadsheet of all countries <ul style="list-style-type: none"> ○ Indexing of budget documents ○ Country profiles • Matrix of accessibility of budget documents of all countries 	30 July 2024 (7 input days)



<ul style="list-style-type: none"> • A source protocol document, for the countries in the PFM knowledge hub to indicate the main sources/links of information for collection. 	
<ul style="list-style-type: none"> • Database of budget documents of all AU member states July to September 2024 <ul style="list-style-type: none"> ○ Flat database of budget documents ○ Filed database of budget documents • Updated excel spreadsheet of all countries <ul style="list-style-type: none"> ○ Indexing of budget documents ○ Country profiles • Matrix of accessibility of budget documents of all countries • A source protocol document, for the countries in the PFM knowledge hub to indicate the main sources/links of information for collection. 	<p>15 October 2024 (7 input days)</p>
<ul style="list-style-type: none"> • Database of budget documents of all AU member states October to December 2024 <ul style="list-style-type: none"> ○ Flat database of budget documents ○ Filed database of budget documents • Updated excel spreadsheet of all countries <ul style="list-style-type: none"> ○ Indexing of budget documents ○ Country profiles • Matrix of accessibility of budget documents of all countries • A source protocol document, for the countries in the PFM knowledge hub to indicate the main sources/links of information for collection. 	<p>15 January 2025 (7 input days)</p>

3. REQUIRED QUALIFICATIONS AND EXPERIENCE

The service provider will be a consultant, firm, consortium or institution with a project lead that meets the following minimum requirements:

- Undergraduate degree in economics or related field with data and/or technology related qualification
- Strong knowledge of PFM and understanding of the budget process
- Experience in research and data gathering
- Strong capacity in data architecture, management and security
- Strong knowledge of Microsoft Office (i.e. Excel and Word) or related packages
- Strong knowledge of managing online platforms
- Working knowledge of English. French and/or Portuguese preferred.

4. WORKING MODE OF THE EXPERT

Place of assignment

The service provider will be required to attend regular meetings with CABRI, either in-person or through virtual platforms, for the duration of the assignment.

Deliverables of this project are primarily electronic and therefore majority of the work and engagements shall be virtual.



5. SCORING SHEET FOR TECHNICAL AND FINANCIAL BID

Criteria	Weighting	Points
1. General academic qualifications of the consultant / project lead and adequacy for the proposed assignment (CV with the list of qualifications and Certified copies of qualifications)	30%	
<i>Main / Lead Consultant</i>		
• Specific Master's degree (NQF Level 9) in the relevant sector or equivalent		1
• Specific Master's degree + Accredited PFM certifications (120+ credits at NQF Level 6)		2
• Specific Master's degree + PFM focused Bachelor's degree (NQF Level 7)		3
• Specific Master's degree + PFM related Honours/Postgraduate diploma (NQF Level 8)		4
• Specific Master's degree + PFM related Masters (NQF Level 9)		5
2. Similar experience in the area of expertise of the assignment as described (CV/Profile and Project Proposal with allocated resources/ team)	30%	
• 6 to 7 years of experience		1
• 8 to 9 years of experience		2
• 10 to 11 years of experience		3
• 12 to 13 years of experience		4
• 14 years or more of experience		5
3. Similar experience in the PFM-related data platform and/or other data hosting and content update specific function (CV with details of projects, project owners and references)	20%	
• 2 to 3 years of experience		1
• 4 to 5 years of experience		2
• 6 to 7 years of experience		3
• 8 to 9 years of experience		4
• 10 years or more of experience		5
4. Experience with CABRI, other international organisation or similar work (CV with list of organisations and references)	10%	
• Limited experience (1-3 years) with CABRI or similar organisations		1
• Moderate experience (4-6 years) with CABRI or similar organisations		2
• Significant experience (7-9 years) with CABRI or similar organisations		3
• Significant experience (10-12 years) with CABRI or similar organisations		3
• Extensive experience (13+ years) with CABRI or similar organisations		5
5. Value for money (Project Proposal with Proposed Activities and Costs)	10%	
• Proposal over budget with low cost-effectiveness		1
• Proposal slightly over budget with fair cost-effectiveness		2
• Proposal meets budget with good cost-effectiveness		3
• Proposal under budget with high cost-effectiveness		4
• Proposal significantly under budget and highest cost-effectiveness		5
Total	100%	

Note the following scoring areas:

- (a) Each CV must be clear of each project duration specified (start month and year to the end month and year) – not just indicating a year. The least possible point will be awarded if not specified.



6. TERMS & CONDITIONS

The terms of the contract will follow CABRI's rules and procedures (to be made available to service providers upon request). Payment will be made after the full completion of each deliverable described above.

The service provider shall submit original invoices. Payments will be made following approval of satisfactory services performed and submission of outputs in line with milestones agreed to in the contract.

Depending on the timeliness and quality of the deliverables, the CABRI Secretariat reserves the right to limit the scope of or terminate the assignment at any stage.

7. PROCUREMENT PREREQUISITE DOCUMENTATION

Applications

Consultants, companies, consortiums or institutions should indicate their interest by submitting a **technical** and **financial** proposal.

- The **technical proposal** should include (1) a brief company profile – that shows a range of services offered (2) the CV(s) of the consultant or team assigned to the project, and (3) a brief project plan in line with the deliverables above.
- The **financial proposal** should present (1) the total budget required for the assignment, with (2) a breakdown between fees and expenses, and (3) indicating the number of days for each person involved in the project. **The total budget should not exceed USD 35 000.**

Other documents required are as follows:

- A completed supplier application form
- A completed ownership of the business form
- A completed proposed fee structure for services form
- A completed electronic payment instruction form

8. REQUEST FOR BIDS

Requests for project proposals/bids procured through this ToR will be done through a "Public Bidding" process.

9. SUBMISSION AND ENQUIRIES DETAILS

Proposals should be submitted to the CABRI secretariat via e-mail to procurementDS@cabri-sbo.org.

Deadline for submission of proposals: **8 May 2024**

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Annexure 1: Example of country matrix (The Gambia)

GAMBIA							
Document	2010	2011	2012	2013	2014	2015	2016
Pre-budget statement	Google search suggests documents can be purchased						
Executive's budget proposal	Available online	Assumed to be produced for free access, due to availability of document in other years		Available online	Available online	Available online	Assumed to be produced for free access, due to availability of document in other years
Enacted budget	Google search suggests documents can be purchased					Available online	Produced for paid public access, at a set fee
Citizens' budget	Produced for internal use only	Produced for internal use only	Produced for internal use only	Produced for internal use only	Available online	Assumed to be produced for free access, due to availability of document in other years	
In-year reports	Produced for internal use only	Produced for internal use only	Produced for internal use only	Produced for internal use only	Produced for internal use only	Produced for internal use only	Produced for internal use only
Mid-year review	Produced for internal use only	Produced for internal use only	Produced for internal use only	Produced for internal use only	Produced for internal use only	Produced for internal use only	Produced for internal use only
Year-end report	Produced for internal use only	Produced for internal use only	Produced for internal use only	Produced for internal use only	Produced for internal use only	Produced for internal use only	Produced for internal use only
Audit report	Produced for internal use only	Produced for internal use only	Produced for internal use only	Produced for internal use only	Produced for internal use only	Produced for internal use only	Produced for internal use only

- Available online
- Produced for free public access, but not available online
- Produced for paid public access, at a set fee
- Produced for internal use only
- Not produced