

Terms of reference (ToRs) for the procurement of services below the EU threshold

Proof-reading, Editing, Design & Layout Services for communication products.

**Project number/
cost centre:
20.9087.6-001.00**

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0. List of abbreviations

GTCC	General Terms and Conditions of Contract (GTCC) for supplying services and work 2022
IKI	International Climate Initiative
BMWK	German Federal Ministry for Economic Affairs and Climate Action
UNFCCC	United Nations Framework Convention on Climate Change
DFFE	Department of Forestry Fisheries and the Environment
NCCRP	National Climate Change Response Policy
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH
GCIS	Government Communication and Information Services
ToRs	Terms of reference

1. Context

The Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH supports the National Department of Forestry, Fisheries and the Environment (DFFE) through the Climate Support Programme. The Climate Support Programme (CSP) is implemented by the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH on behalf of the of the German Federal Ministry for Economic Affairs and Climate Action (BMWK), as part of the International Climate Initiative (IKI). South Africa is a signatory to the United Nations Framework Convention on Climate Change (UNFCCC), and it is committed to combat climate change. The impacts of climate change affect almost every sector in South Africa including agriculture, water, health, trade, transportation, infrastructural development, tourism, and finance. The CSP supports the South African National Department of Forestry Fisheries and the Environment (DFFE) in the development of climate policy and implementation of appropriate national climate action measures in areas of governance, mitigation, adaptation, monitoring and evaluation. CSP has provided prior support to DFFE in developing South Africa's National Climate Change Response Policy (NCCRP) and is now advising DFFE on scientific analysis, policy development and consensus building to support the implementation of the NCCRP. Apart from technical advisory services, CSP also supports the DFFE with design and layout, proofreading and editing of studies and reports in preparation for publication.

2. Tasks to be performed by the contractor

- The contractor is required to edit, proofread, and undertake the design, layout and branding of communication products which include amongst others (studies, brochures, factsheets, infographics, publications, banners and power point presentations) for the Climate Cluster, as well as for the DFFE. The usage of logos and how they can be aligned in the communication products will closely be coordinated by GIZ and guidance will be provided to the service provider. The language used must be South African English and must follow the guidelines of GIZ and/or for government documents based on the Editorial Style Guide by the Government Communication and Information Services (GCIS). Specific Proofreading, editing and design & layout requirements are listed in Annex 1, subject to final decision and prioritisation of GIZ.

The contractor is responsible for providing the following services:

- Checking and proofreading first drafts of communication products and sending back the products with comments for review and input.
- Conducting final proofreading, ensuring all comments have been incorporated and edit all chapters in communication products.
- Verification of all references used in communication products.
- Draft Design, layout, and branding of communication products.
- Submit final layout, designs, and branding of communication products, prior to printing.
- Conducting a quality and oversight check of all products

- Provide printing specifications for all the publications, including paper quality, bleed, and other relevant specifications.
- Workload management and review of timelines for document processing.
- Specific Editing, proofreading, design and layout requirements are listed in Annex 1, which, inter alia, include the following (subject to final decision and prioritisation of GIZ):

Certain milestones, as laid out in the table below, are to be achieved by certain dates during the contract term:

Milestone	Deadline/place/person responsible
Inception Meeting	Meeting within 2 weeks of contract signature
Inception report	Report submission within 2 weeks of the inception report
Approximately 6050 pages of communication products proofread, edited, designed, and layered out.	Deliverable within 40 weeks of the inception meeting
Approximately 12065 pages of communication products proofread, edited, designed, and layered out	Deliverable by the 31 st of January 2025

Period of assignment: From 15 December 2022 until 31 January 2025.

3. Concept

In the bid, the bidder is required to show how the objectives defined in Chapter 2 are to be achieved, if applicable under consideration of further specific method-related requirements (technical-methodological concept). In addition, the bidder must describe the project management system for service provision.

Technical-methodological concept

Strategy: The bidder is required to consider the tasks to be performed with reference to the objectives of the services put out to tender (see Chapter 1). Following this, the bidder presents and justifies the strategy with which it intends to provide the services for which it is responsible (see Chapter 2).

Before the respective products of the above-mentioned work packages are created, an inception meeting will be held between GIZ and the service provider.

With regard to the implementation of the products referred to in Chapter 2, the Contractor shall also have a strategy setting out the following:

- the Contractor can be reached in case of queries,
- the Contractor can guarantee very short-term support (usually 24 hours in advance), timely delivery and timely adherence to deadlines,

- if necessary, services can be ensured on weekends,
- the Contractor can guarantee ad-hoc inquiries within a few hours, timely delivery, and punctual adherence to deadlines,
- the quality assurance of the products is carried out in accordance with the expectations of the client.

The bidder is required to present and justify the strategy with which he intends to achieve the tasks for which he is responsible (see Chapter 2), taking into account the breadth of the topics and the sometimes very short delivery times.

The bidder is required to present the actors relevant for the services for which it is responsible and describe the **cooperation** with them.

The bidder is required to present and explain its approach to **steering** the measures with the project partners and its contribution to the results-based monitoring system.

The bidder is required to describe the key **processes** for the services for which it is responsible and create a schedule that describes how the services according to Chapter 2 are to be provided. In particular, the bidder is required to describe the necessary work steps and, if applicable, take account of the milestones and contributions of other actors in accordance with Chapter 2.

Project management of the contractor

The bidder is required to explain its **approach for coordination with the GIZ project management team**. The following tasks, amongst others, will be expected by the contractor:

- The Contractor shall be responsible for the selection, preparation, training and control of the staff employed to carry out the advisory tasks.
- The contractor makes available equipment and supplies (consumables) and assumes the associated operating and administrative costs.
- The contractor manages costs and expenditures, accounting processes and invoicing in line with the requirements of GIZ. The contractor reports regularly to GIZ in accordance with the GTCC (2022)

In addition to the reports required by GIZ in accordance with the GTCC, the contractor submits the following reports:

- Inception report
- Brief quarterly or half-yearly reports on the implementation status of the project, and a list of produced outputs (final communication products produced per quarter) (5-7 pages)
- Final report

The bidder is required to draw up a **personnel assignment plan** with explanatory notes that lists all the experts proposed in the bid; the plan includes information on assignment dates (duration and expert days) and locations of the individual members of the team complete with the allocation of work steps as set out in the schedule.

The bidder is required to describe its **backstopping concept**. The following services are part of the standard backstopping package, which (like ancillary personnel costs) must be factored into the fee schedules of the staff listed in the bid in accordance with the GTCC 2022:

- Service-delivery control
- Managing adaptations to changing conditions
- Ensuring the flow of information between GIZ and field staff
- Contractor's responsibility for seconded personnel
- Process-oriented technical-conceptual steering of the consultancy inputs
- Securing the administrative conclusion of the project
- Ensuring compliance with reporting requirements
- Providing specialist support for the on-site team by staff at company headquarters
- Sharing the lessons learned by the contractor and leveraging the value of lessons learned on site

The project will be administered by GIZ. All intellectual property generated during or as a result of this project will be the property of the GIZ and Department Forestry Fisheries and the Environment and is not to be shared or published without written permission from the GIZ and the Department.

Service-delivery control

All services performed will be evaluated and signed off by GIZ experts to effect invoice payment

4. Personnel concept

The bidder is required to provide personnel who are suited to filling the positions described, based on their CVs (see Chapter 0), the range of tasks involved and the required qualifications.

The below specified qualifications represent the requirements to reach the maximum number of points.

Team leader

Tasks of the team leader

- Overall responsibility for the advisory packages (Quality and deadlines) and a quality and oversight assurance of the contractor.
- Coordinating and ensuring communication with GIZ, partners and others involved in the project
- Regular reporting in accordance with deadlines

Qualifications of the team leader

- Education/training (2.1.1): University qualification in English/ Journalism / Media Studies / Communications or related discipline.
- Language (2.1.2): Good business language skills in English
- General professional experience (2.1.3): 10 years of professional experience in writing, proof-reading, and editing content for publication in print, online or digital platforms.
- Specific professional experience (2.1.4): 5 years in the climate change sector and experience in creative writing for marketing communication collateral, academic journals, news, and social media platforms.
- Leadership/management experience (2.1.5): 5 years of management/leadership experience as project team leader or manager in a company
- Regional experience (2.1.6): 5 years of experience in projects in South Africa.
- Development Cooperation (DC) experience (2.1.7): 2 years of experience in working with development organizations.

Expert 1: *Graphic Designer*

Tasks of expert 1

- Design, layout, and branding of communication products.
- Provide final layout of communication products.
- Provide printing specifications for all the publications, including paper quality, bleed, and so on.

Qualifications of expert 1

- Education/training (2.2.1): Bachelor of Arts or equivalent in Graphic Design/Communications/ Visual Arts/ Graphic Art or related discipline.
- Language (2.2.2): Good business language skills in English
- General professional experience (2.2.3): 5 years of professional experience in the design sector and illustrator software, as well as web design applications.
- Specific professional experience (2.2.4): 2 years of experience in the field of climate change.
- Leadership/management experience (2.2.5): N/A
- Regional experience (2.2.6): 4 years of experience in projects in South Africa
- Development Cooperation (DC) experience (2.2.7): 2 years of experience in working with development organizations
- Other (2.2.8): N/A

Expert 2: *Editor*

Tasks of Expert 2

- Check and proofread first drafts and send back with comments.
- Final proofreading and editing of all chapters in reports and studies before printing.
- Verification of all references used in reports and studies.

- Check final layout version, including whether all comments have been incorporated and a quality and oversight check.

Qualifications of Expert 2

- Qualification (2.3.1): Bachelor of Arts degree or equivalent in Journalism
- Language (2.3.2): Good business language skills in English
- General professional experience (2.3.3): 5 years of professional experience in publishing, teaching, corporate communication, and related sectors. Experience in writing, proof-reading, and editing in print and digital platforms
- Specific professional experience (2.3.4): Two (2) years of experience in the field of climate change
- Leadership/management experience (2.3.5): N/A
- Regional experience (2.3.6): 4 years of experience in projects in South Africa
- Development Cooperation (DC) experience (2.3.7): Two (2) years of experience in DC projects
- Other (2.3.8): N/A

Soft skills of team members

In addition to their specialist qualifications, the following qualifications are required of team members:

- Team skills
- Initiative
- Communication skills
- Sociocultural competence
- Efficient, partner- and client-focused working methods
- Interdisciplinary thinking

5. Costing requirements

Assignment of personnel

The service provider should submit a price offer for **340 expert days** for the above tasks.

Travel

The bidder is required to calculate the travel by the specified experts and the experts it has proposed based on the places of performance stipulated in Chapter 2 and list the expenses separately by daily allowance, accommodation expenses, flight costs and other travel expenses.

Other cost

- Car Hire
- Communication Branded collateral
- Banners

6. Inputs of GIZ or other actors

GIZ and DFFE will make the following available:

- Virtual platforms for update meetings (MS Teams)
- Venue for inception meeting

NB: Any deliverables that require physical meetings and travel, will only be carried out if permitted by GIZ risk management regulations in light of Covid-19 and the national lock down regulations. Any in-person meetings should be designed with a flexible schedule and propose virtual or blended formats as alternatives where possible.

7. Requirements on the format of the bid

The structure of the bid must correspond to the structure of the ToRs. In particular, the detailed structure of the concept (Chapter 3) is to be organised in accordance with the positively weighted criteria in the assessment grid (not with zero). It must be legible (font size 11 or larger) and clearly formulated. The bid is drawn up in English (language).

The complete bid shall not exceed 10 pages (excluding CVs).

The CVs of the personnel proposed in accordance with Chapter 0 of the ToRs must be submitted using the format specified in the terms and conditions for application. The CVs shall not exceed 4 pages. The CVs must clearly show the position and job the proposed person held in the reference project and for how long. The CVs can also be submitted in English (language).

If one of the maximum page lengths is exceeded, the content appearing after the cut-off point will not be included in the assessment.

Please calculate your price bid based exactly on the aforementioned costing requirements. In the contract the contractor has no claim to fully exhaust the days/travel/workshops/ budgets. The number of days/travel/workshops and the budget amount shall be agreed in the contract as 'up to' amounts. The specifications for pricing are defined in the price schedule.

As the contract to be concluded is a contract for works, please offer a fixed lump sum price that covers all applicable costs (fees, travel expenses etc.). The price bid will be evaluated based on the specified lump sum price. For our internal costing and any further commissions, please also provide the daily rate which the prices are based on. A breakdown of days is not required.

Other Requirements

- Please submit your proposal (technical and price proposal) in separate files/folder to ZA_Quotation@giz.de no later than **28.11.2022**, all documents must be in PDF.

- Please do not mention any price for this measure on your cover letter/Technical proposal.
- Please submit your tax clearance certificate with the bidding documents.
- Please submit your price proposal in ZAR.

- Our General Terms of Conditions (attached) shall not be changed/amended should you be the winner of this tender. These General Terms and Conditions will form part of the contract should you be awarded this contract. By submitting your proposal we will conclude that you have read and accepted these terms and conditions.
- Bidders are not allowed to communicate directly with any other person regarding this bid other than the procurement official/s. Failure to comply with this requirement may lead to your bid being disqualified.
- Bidders must strictly avoid conflicts with other assignments or their own interests. Bidders found to have a conflict of interest shall be disqualified. Without limitation on the generality of the above, Bidders, and any of their affiliates, shall be considered to have a conflict of interest with one or more parties in this EOI and tender process, if they:
 - a) are or have been associated in the past, with a firm or any of its affiliates which have been engaged by GIZ or the Interim Supply Chain Management Council to provide services for the preparation of the design, specifications, Terms of Reference, cost analysis/estimation, and other documents to be used for the procurement of the services in this selection process;
 - b) were involved in the preparation and/or design of the programme/project related to the services requested under this EOI and tender;
 - c) are serving or have been serving in the past three months in the structures of the Interim Supply Chain Management; or
 - d) are found to be in conflict for any other reason, as may be established by, or at the discretion of GIZ.

- In the event of any uncertainty in the interpretation of a potential conflict of interest, Bidders must disclose to GIZ, and seek GIZ's confirmation on whether or not such a conflict exists.

- Similarly, the Bidders must disclose in their proposal their knowledge of the following:
 - a) if the owners, part-owners, officers, directors, controlling shareholders, of the bidding entity or key personnel are family members of GIZ staff involved in the procurement functions and/or the Interim SCM Council or any Implementing partner receiving services under this EOI or tender; and
 - b) all other circumstances that could potentially lead to actual or perceived conflict of interest, collusion or unfair competition practices.

- **Failure to disclose such an information may result in the rejection of the proposal or proposals affected by the non-disclosure.**
- **Questions & Answers will be placed on the link provided.**

Bids sent via Dropbox and WeTransfer will not be accepted.

8. Annexes

Annex 1: Specific Editing, proofreading, and design and layout requirements

Annexes

Annex 1: Specific Editing, proofreading, and design and layout requirements

NB: The products' names may be different from the ones mentioned in the table below.

Proof-reading, Editing, Design & Layout Services		
Item Number	Product	Approximate number of pages (Up to)
1	Interface: IKI Workshop Materials	120
2	Interface: IKI Newsletter (8 th , 9 th , 10 th , 11 th & 12 th up to 17 th Edition)	150
3	Communication Branded Collateral: Corporate gifts, Brochures, Folders, etc [including pens, memory sticks, note-pads, bags, mugs, corporate wear, etc]	500
4	Training for Media Practitioners: Workshop Materials	30
5	DFFE Climate Change Awareness, Education and Communication Strategy document	10
6	Scoping study: A blue carbon sinks Assessment for South Africa	330
7	Biodiversity Sector Strategy	260
8	Various Policy Briefs and Studies	700
9	Methodology for the construction of South Africa's Preliminary National Forest Reference Emission Levels	60
10	Phase 2 Survey on economy-wide fuel consumption with emphasis on demand-side sectors for the period 2013-2018 and estimation of vehicle kilometres travelled (VKT) for the period 2000 – 2018 and projections to 2035	120
11	South Africa's Grid Greenhouse Gas Emission Factor Methodological Report	40
12	Conceptualisation, Development and Implementation of Indigenous Knowledge Systems on Climate Change	50

	Response, Monitoring and Evaluation in Limpopo Province	
13	Development of Country-specific GHG Emission Factors for Liquid and Gaseous Fuels in South Africa	100
14	Development of plant-specific emission factors for fuels used in the cement sector	60
15	Procurement-related Advert designs	50
16	Annual Climate change Adaptation Report	200
17	National Climate Change Adaptation Research Agenda	60
18	NRVF Implementation Plan – Grass-root level	120
19	Health Risk and Vulnerability Framework	60
20	NCCAS Fact sheet	10
21	Various Fact Sheets and Infographics,	100
22	National Climate Change Strategy for the Health Sector	150
23	Development of the Climate Cluster Narrative Booklet	20
24	Carbon Budgets Regulations and Allocations	200
25	Sectoral emission targets	200
26	Creation of templates for communication via twitter (with empty text and picture elements which we can add)	10-15 templates (not necessarily pages)
	Miscellaneous Products	
27	Other Publications / Documents / Templates	8350
Total		12066