

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

Conference preparation and implementation: Learning Forum	Project number/ cost centre: 20.2210.1-001.00
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0.	List of abbreviations	2
1.	Context.....	3
	Project description.....	3
	Problem analysis.....	3
	Project approach	4
2.	Tasks to be performed by the contractor	4
3.	Eligibility Criteria.....	6
4.	Concept.....	7
5.	Personnel concept.....	7
	Team leader	8
	Short-term expert pool with minimum 2, maximum 5 members	8
6.	Costing requirements	9
	Sustainability aspects for travel	9
7.	Inputs of GIZ or other actors.....	10
8.	Requirements on the format of the tender	11
9.	Outsourced processing of personal data	11
	Personal data will be processed on behalf of the client. Therefore, an agreement on “Outsourcing of data processing (AuV)” will be concluded with the contractor in accordance with Art. 28 EU Regulation 2016/679 on General Data Protection Regulation (GDPR). For this purpose, the technical and organizational measures (TOM) for compliance with the data protection requirements must be outlined prior to conclusion of the contract. If the contractor has already been audited by GIZ in the past, an update in accordance with GDPR must nevertheless be sent. After a positive check, the contract is concluded with the AuV attachment.	11
11.	Annexes	13

0. List of abbreviations

AuV	<i>Auftragsverarbeitungsvereinbarung</i> Outsourcing of data processing
AVB	General Terms and Conditions of Contract for supplying services and work
DSD	Department of Social Development
GDPR	Regulation (EU) 2016/679 (General Data Protection Regulation)
NYDA	National Youth Development Agency
PYEI	Presidential Youth Employment Intervention
S2PYEI	Support to the Presidential Youth Employment Intervention
TOM	Technical and organisational measures
ToRs	Terms of reference

1. Context

Project description

On behalf of the German Federal Ministry for Economic Cooperation and Development (BMZ), the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH implements the project “Support to the Presidential Youth Employment Intervention (S2PYEI)”. The project supports the Programme Management Office (PMO) at the Presidency of the Republic of South Africa in the coordination and implementation of the PYEI.

In doing so, the programme works along two main strains of activity:

- (1) Supporting the PMO in coordinating the PYEI and developing its governance structures and
- (2) Strengthening the capacities of PYEI implementing organisations.

Problem analysis

South Africa is currently the country with the highest official unemployment rate in the world. Young people in particular struggle to enter the labour market. In response to this challenge, the President of the Republic of South Africa has established the Presidential Youth Employment Intervention (PYEI) – a comprehensive effort to ensure young people are successfully transitioning from learning to earning.

One component of the PYEI is the National Youth Service (NYS), which is led by the National Youth Development Agency (NYDA). The NYS funds NGOs able to provide a minimum 3,000 youth with community service opportunities in line with minimum wage standards for a period of six months with 16 hours per week. The community service is accompanied by training measures and aims to enhance the employability of the participants.

From April 2022 to March 2023, the NYDA National Youth Service Unit (NYSU) implemented a the NGO Capacity Building Programme (hereinafter: the programme) aimed at enhancing the capacities of 100 youth-led civil society organisations across all South African Provinces. The programme was implemented in collaboration with the Department of Social Development (DSD) and other key government partners.

Due to the large scale of the NYS projects, a large number of NGOs are involved in its implementation: Most of the funding recipients in the first NYS iteration (2022 – 2023) were well-established NGOs, each of which worked with dozens or even hundreds of smaller NGOs. The NGO Capacity Building Programme of the NYSU aimed to strengthen the pipeline of potential implementing partners.

Some of the elements of the Programme could not be delivered as planned. In collaboration with the NYSU, S2PYEI is conducting an evaluation of the programme (July 2023), which will reveal capacity needs of the participants after the conclusion of the programme. What is missing in particular is room for exchange of best practices and learnings among the participants.

Project approach

S2PYEI seeks to support the NYDA in hosting a Learning Forum conference for the Programme participants. This 2-day (3 nights) event is designed to enhance the participants' understanding of what is required for their participation in the NYS, to provide room for knowledge exchange, and to further build the skills of the participants. The Learning Forum shall take place in person in Gauteng from 07 to 10 November 2023.

2. Tasks to be performed by the contractor

The contractor is responsible for providing the following services:

2.1 Marketing and communication

The contractor shall provide the following:

- A design theme to be used across communication material for the Learning Forum (in consultation with NYDA and GIZ)
- The preliminary program (in .pdf format)
- The final program (in .pdf format and printed)
- A photo booth at the event, including hashtags for participants to use when posting their own photos on social media
- Roll-up banners for the event
- Photography of the event
- Prepare social media posts that can be shared by GIZ and NYDA (for LinkedIn, Twitter etc)

All products must include the PYEI, GIZ and NYDA logos, which will be made available to the contractor by GIZ. All material has to be in line with GIZ and NYDA corporate communication standards and must be approved by GIZ and NYDA.

2.2 Invitations and participant management

The contractor ensures timely participant registration. This includes:

- Preparing and sending out invites to the contacts provided by GIZ
- Registering the participants and providing them with confirmation of their successful registration, collecting information on the following:
 - Name of the participants
 - Gender of the participant
 - If applicable: disability of the participant (this information is required to assess if particular measures need to be taken to enable the person to fully participate, for instance by providing sign language translation)
 - Special dietary restrictions
 - Name of the organisation
 - Any other information required to make the necessary logistic arrangements (see below)
- Reminding participants of the event 1 week in advance
- Welcoming and accrediting participants upon arrival at the event, including handing out name tags, the printed programme and, if sensible, floor plans
- Assisting participants with special needs
- Ensuring clear, thoughtful, timely communication with all participants

- Responding to any participant queries in the preparation of and during the Learning Forum

2.3 Travel logistics

The contractor will assume the following tasks:

- Make all required travel arrangements for the participants, incl. booking of flights, bus tickets, transport from the participants' place of departure and the airport of departure (if applicable) and transport between the airport and the venue. Travel itineraries must take into consideration economic, environmental and safety considerations. In particular, the following shall be considered:
 - Itineraries shall be designed in a way that no participants have to depart on their journey before 07.00 on 07 November 2023, and that no participant arrives at the venue later than 19.00 on the same day.
 - On the day of departure, no participant shall have to depart before 07.00, and no participant shall reach their destination after 20.00.

2.5 Venue setting

The contractor ensures all meeting rooms (for plenary and breakout sessions) are arranged and ready for the Learning Forum as per the programme. This includes:

- Make sure all necessary audio-visual equipment is available, including the following equipment provided by the contractor:
 - a. 3 microphones
 - b. High quality sound speakers sufficient to ensure good quality in the plenary room
 - c. Projector suitable for the size of the venue
 - d. Technology to enable virtual participation of individual speakers
 - e. Any cables or other utensils required for a functioning sound system.
- Set up PowerPoint presentations including uploading of content and videos
- Run technology, equipment and sound checks before the start of the programme
- Ensure technological support is available throughout the conference for troubleshooting
- Ensure conference rooms are fully equipped with communication material (banners, programmes etc.)
- Ensure all conference rooms are equipped with water and stationary
- Ensure the venue has available workstations, including charging ports for conference delegates
- Arrange participant seating and stage set-up for every session in the programme

2.6 Implementation of the programme

- The contractor shall provide a facilitator to guide participants through the event as per the programme
- The contractor shall identify and book entertainment (e.g. a band) for the last dinner in consultation with GIZ and NYDA. Suggestions for entertainment shall be made to NYDA and GIZ and require their approval.

2.7 Post-event logistics

The contractor is responsible for dismantling the conference venue and transporting any material owned by GIZ or NYDA back to their respective offices. The contractor shall also ensure all bills in relation to the event are settled.

2.8 Evaluation and reflection

The contractor shall conduct an online survey among the participants to assess their satisfaction with the event. The survey questions shall be provided to GIZ and NYDA for their input before the survey is conducted.

The contractor shall provide GIZ with the list of participants, any photography produced under this contract, as well as the results of the satisfaction survey.

2.9 Milestones

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

Milestones/process steps/partial services	Deadline/place/person responsible
Kick-off meeting with GIZ and NYDA	September 2023
Invitation of participants	25 September 2023
Submission of final list of participants and final programme	02 October 2023
Learning Forum	31 October – 03 November 2023
Satisfaction survey	03 – 07 November 2023
Submission of photography and survey results	10 November 2023

Period of assignment: from 15 September 2023 until 10 November 2023.

- The contractor is responsible for selecting, preparing, training and steering the short and long-term experts assigned to perform the tasks.
- The contractor provides 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 current AVB of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH.

3. Eligibility Criteria

The bidder should fulfil following minimum eligibility criteria:

3.1 Commercial register entry

3.2 Average annual turnover for the last three financial years of at least R 200,000

3.3 Average number of employees and managers for the past three calendar years: At least 5 persons

3.4 The bidder must also provide examples of three (3) projects (conference and event management) with a minimum commission value of R 1,000,000 in the past 3 years through a brief description of the project, the dates and who the services were provided for.

4. Concept

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

Note: The numbers in parentheses correspond to the lines of the technical assessment grid.

Technical-methodological concept

Strategy (1.1): The tenderer is required to consider the tasks to be performed with reference to the objectives of the services put out to tender (see Chapter 1 Context) (1.1.1). Following this, the tenderer presents and justifies the explicit strategy with which it intends to provide the services for which it is responsible (see Chapter 2 Tasks to be performed) (1.1.2).

The tenderer is required to present the actors relevant for the services for which it is responsible and describe the cooperation (1.2) with them.

The tenderer is required to present and explain its approach to steering the measures with the project partners (1.3.1).

The tenderer is required to describe the key processes for the services for which it is responsible and create an operational plan or schedule (1.4.1) that describes how the services according to Chapter 2 (Tasks to be performed by the contractor) are to be provided. In particular, the tenderer is required to describe the necessary work steps and, if applicable, take account of the milestones and contributions of other actors (partner contributions) in accordance with Chapter 2 (Tasks to be performed) (1.4.2).

Project management of the contractor (1.6)

The tenderer is required to explain its approach for coordination with the GIZ project. In particular, the project management requirements specified in Chapter 2 (Tasks to be performed by the contractor) must be explained in detail.

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

5. Personnel concept

The tenderer is required to provide personnel who are suited to filling the positions described, on the basis of their CVs (see Chapter 8), the range of tasks involved and the required qualifications.

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

Team leader

Tasks of the team leader

- Overall responsibility for the tasks of the contractor (quality and deadlines)
- Coordinating and ensuring communication with GIZ, partners and others involved in the project
- Personnel management, in particular identifying the need for short-term assignments within the available budget, as well as planning and steering assignments and supporting short-term experts
- Regular reporting in accordance with deadlines

Qualifications of the team leader

- Education/training (2.1.1): University degree (Bachelor or equivalent) in Event Management, Communication, Social Sciences or another relevant degree
- Language (2.1.2): C1-level language proficiency in English
- General professional experience (2.1.3): 10 years professional experience in event management
- Specific professional experience (2.1.4): 3 reference projects in conference management with more than 150 participants (provide title, location, dates, client, target group)
- 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): 10 years of experience in South Africa
- Development cooperation (DC) experience (2.1.7): none
- Other (2.1.8): none

Short-term expert pool with minimum 2, maximum 5 members

For the technical assessment, an average of the qualifications of all specified members of the expert pool is calculated. Please send a CV for each pool member (see below Chapter 7 Requirements on the format of the bid) for the assessment.

Tasks of the short-term expert pool

- Support team leader with preparation, implementation and post-processing phase of the event
- Carry out tasks as laid out in Chapter 2, including the design of communication material, travel logistics, and facilitation of the event
- Communicate and liaise with GIZ and NYDA throughout all phases.

Qualifications of the short-term expert pool

- Education/training (2.6.1): All experts with university qualification (Bachelor) in Event Management, Communication, Social Sciences or another relevant degree
- Language (2.6.2): All experts with C1-level language proficiency in English
- General professional experience (2.6.3): All experts with 3 years of professional experience in the relevant sector (e.g. event management, design, communication)
- Specific professional experience (2.6.4): 1 expert with 2 years of professional experience in travel logistics; 1 expert with at least 5 reference projects in facilitating/ moderating events of a similar scale (please ensure the CV details the names, target groups and dates of the reference projects)
- Regional experience (2.6.5): All experts with 3 years of experience in South Africa

- Development cooperation (DC) experience (2.6.6): None
- Other (2.6.7): None

The tenderer must provide a clear overview of all proposed short-term experts and their individual qualifications.

6. Costing requirements

Sustainability aspects for travel

GIZ would like to reduce greenhouse gas emissions (CO₂ emissions) caused by travel. When preparing your tender, please incorporate options for reducing emissions, such as selecting the lowest-emission booking class (economy) and using means of transport, airlines and flight routes with a higher CO₂ efficiency.

If they cannot be avoided, CO₂ emissions caused by air travel should be offset. GIZ specifies a budget for this, through which the carbon offsets can be settled against evidence (see table below).

Specification of inputs

Fee days	Number of experts	Number of days per expert	Total	Comments
Designation of team leader	1	100	100	
Designation of short-term expert pool	5	20	100	
Travel expenses	Quantity	Price	Total	Comments
Per-diem allowance	14			Allowances for up to 7 days for up to 2 experts each
Overnight allowance	10			Up to 5 nights accommodation for up to 2 experts each
Transport	Quantity	Price	Total	Comments
Domestic flights	100			Fixed budget for return flights for experts and participants within the country of assignment during service delivery. The actual cost of the flights will be reimbursed by GIZ against evidence.

CO₂ compensation for air travel	100			This budget is earmarked for settling carbon offsets against evidence.
Travel expenses (e.g. train, car, bus)	173			Fixed travel budget for all participants and the experts within the country of assignment, incl. transfer to/from airport, transport by bus etc. The costs will be reimbursed against evidence.
Other costs	Number	Price	Total	Comments
Flexible remuneration	1	R 80,000	R 80,000	A budget of ZAR 80,000 is foreseen for flexible remuneration. Please incorporate this budget into the price schedule. Use of the flexible remuneration item requires prior written approval from GIZ.
Subcontracts				Please calculate a budget for the following costs: 1. Photography, 2. sign-language interpreter (if applicable), 3. Entertainment, 4. rental conferencing equipment if required.

7. Inputs of GIZ or other actors

GIZ and partners are expected to make the following available:

- Sending out a save-the-date to the invitees two months before the event to ensure availability and swift registration once the invites have been sent out by the contractor
- Making available to the contractor the list of persons to whom the invitation is to be extended, including email addresses
- Booking of the conferencing venue, including water and stationary (anticipated by mid-September 2023)
- Booking of the accommodation for participants and any other persons involved in the event (except the contractor)
- Catering for all meals throughout the event (breakfast, lunch, dinner, one coffee break in the later morning and one in the afternoon) for participants, speakers, organisers and facilitators (incl. the contractor)

- Transport to and from the venue for any persons involved in the event that are not participants (except the contractor)

8. Requirements on the format of the tender

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

The complete tender must not exceed 10 pages (excluding CVs). If one of the maximum page lengths is exceeded, the content appearing after the cut-off point will not be included in the assessment. External content (e.g. links to websites) will also not be considered.

The CVs of the personnel proposed in accordance with Chapter 5 of the ToRs must be submitted using the format specified in the terms and conditions for application. The CVs shall not exceed 2 pages each. They must clearly show the position and job the proposed person held in the reference project and for how long.

Please calculate your financial tender based exactly on the parameters specified in Chapter 5 Quantitative requirements. The contractor is **not** contractually entitled to use up the days, trips, workshops or budgets in full. The number of days, trips and workshops and the budgets will be contractually agreed as **maximum limits**. The specifications for pricing are defined in the price schedule.

9. Outsourced processing of personal data

Personal data will be processed on behalf of the client. Therefore, an agreement on "Outsourcing of data processing (AuV)" will be concluded with the contractor in accordance with Art. 28 EU Regulation 2016/679 on General Data Protection Regulation (GDPR). For this purpose, the technical and organizational measures (TOM) for compliance with the data protection requirements must be outlined prior to conclusion of the contract. If the contractor has already been audited by GIZ in the past, an update in accordance with GDPR must nevertheless be sent. After a positive check, the contract is concluded with the AuV attachment.

10. Other Requirements

- Please submit your proposal (technical and price proposal) in separate files/folder to ZA_Quotation@giz.de no later than **1st September 2023** all documents must be in PDF.
- **Submission to any other email address may invalidate your bid.**
- 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.

- Participating more than once in same tender is not allowed and it will lead to your proposal as well as that of the company where you appear more than once being disqualified. The responsibility rests with the companies to ensure that their partners/experts are not bidding/participating more than once in same tender.
- **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.

Scientific data

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.**

- **Bids sent via Dropbox and WeTransfer will not be accepted.**

11. Annexes

- Minimum standards for sustainable event management at GIZ
- Agreement on outsourcing of data processing (AuV)