

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

Preparation and implementation of events	Project number/ cost centre: 20.2210.1-001.00
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0. List of abbreviations

AVB	General Terms and Conditions of Contract for supplying services and work
BMZ	German Federal Ministry for Economic Cooperation and Development
PYEI	Presidential Youth Employment Intervention (PYEI)
S2PYEI	Support to the Presidential Youth Employment Intervention
ToRs	Terms of reference

1. Context

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 strands of activity:

- Supporting the PMO in coordinating the PYEI and its partners/stakeholders and developing its governance structures and;
- Strengthening the capacities of PYEI implementing organisations.

The Presidential Youth Employment Intervention (PYEI) was initiated by the South African President in 2020 to address the persistent challenge of high youth unemployment in South Africa and is supported by resources from the National Treasury and external actors.

Through a mix of demand and supply-side interventions, the PYEI aims to accelerate and enhance programmes that create opportunities for young South Africans to access the labour market, address the skills gap and contribute to economic growth and stability. The PYEI is implemented through a coordinated, multi-sectoral partnership approach and seeks to streamline the efforts of multiple stakeholders in public, private and other non-governmental sectors towards common objectives. More information on the PYEI can be accessed at the website www.stateofthenation.gov.za.

A number of events are planned in the context of the PYEI in 2024, including but not limited to:

- Hybrid learning sessions among representatives of Governmental Departments, Provincial Government, private sector and civil society that aim to share learnings and best practices generated from activities of the PYEI;
- In-person events in different township economies fostering access of information to entrepreneurs on support that is available to them;
- Virtual, hybrid or in-person events to strengthen the capacities of specific target groups, e.g. youth-led non-profit organisations in the space of employment promotion;
- Virtual, hybrid or in-person events for the coordination of the activities of partners of the PYEI, e.g. development cooperation partners;
- Project events for S2PYEI, e.g. a project closure event.

The events differ in target groups (high level to low level or mixed target groups), size (number of hours/ days and number of participants), location and complexity.

S2PYEI seeks the services of a qualified and experienced service provider in the field of event management to handle the logistics of such events taking place throughout the contract duration.

2. Tasks to be performed by the contractor

The contractor is responsible for providing the following services:

Venue booking

The contractor will be required to book venues for events taking into account the following:

- Reliable supply of electricity, with generator if required;
- Safe access to the venue, including secure parking and accessibility for people using walking aides or wheelchairs;
- Capacity of the venue in terms of the number of rooms and participants;
- Seating arrangements;
- Catering for participants and speakers according to specifications to be provided by GIZ, taking into account special dietary requirements of participants;
- Safety at the venue.

Depending on the context, GIZ might need to conduct a site visit with the contractor to the proposed venues before booking can be made to confirm its appropriateness.

Venue setting

In preparing the venue, the contractor will assume the following responsibilities:

- 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 the venue has charging ports for participants and speakers;
- Source and prepare event decoration in line with the theme and branding guidelines;
- Arrange participant seating and stage set-up for every session in the programme.

Invitation and Participant management

The contractor supports efficient invitation and registration of participants. This may include:

- Setting up an online registration system
- Sending invitations to participants
- Collecting information on the following:
 - Name of the participants
 - Special dietary restrictions
 - Name of the organisation/ employer
 - Email address and/or phone number
 - Any other information required to make the necessary logistic arrangements
- Sending out reminders to participants ahead of the event
- Welcoming and accrediting participants upon arrival, 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 event

Providing GIZ with a list of people who actually participated in the event
The contractor shall be responsible for monitoring RSVP progress and promptly informing GIZ of any challenges during progress meetings/by email. The contractor must also provide GIZ with the final RSVP list for each event.

Post-event evaluations

The contractor may be required to conduct online surveys among the participants to assess their satisfaction with the event. The survey questions will be provided to the contractor by GIZ. Upon the closure of the survey, the contractor will then conduct data analysis of the survey results and submit to GIZ the survey results as raw data as well as a PowerPoint presentation of the summary of results. Survey results must be submitted in anonymized form.

Accommodation and Transport

The contractor may be required to arrange accommodation and/or transport for participants and/or speakers. Accommodation should be booked at the venue if possible, or within short distance of the event venue. Accommodation must be appropriate for the respective target group, and must ensure the safety of the people to be accommodated. Based on the specifications that will be provided by GIZ, the contractor will need to propose appropriate accommodation options and booking can only be made after GIZ approval.

Transport may include travel by plane, bus, taxi, train or car. The selected mode of transport must take into account the mobility of the person to be transported, environmental considerations, cost efficiency and safety. GIZ will provide details to the contractor on the persons for whom travel must be arranged, preferred modes of transport and any other considerations that must be taken into account.

Procuring equipment and materials

In the event that the venue doesn't have inhouse conferencing equipment the contractor must procure the following (e.g. as rental equipment):

- Cordless microphones
- High quality sound speakers sufficient to ensure good sound quality
- Projector suitable for the size of the venue
- AV system and technology to enable virtual participation of individual participants
- Any cables or other utensils required for a functioning sound system.

The contractor provides equipment such as the following:

- Name tags
- Notepads and pens
- Printed programmes, floor plans or other printed material
- Printing of roll-up banners and stage backdrops
- Give-aways for participants and speakers

Facilitation, interpretation and documentation

The contractor may be required to supply facilitators for events as well as sign-language interpretation.

The contractor may also be required to provide for the documentation of events, visually (photography) and/or by compiling reports at the end of events specifying:

- Event objectives
- Methodology
- Outcomes

- Participants
- Recommendations

Project management requirements:

- In preparation of each event, GIZ will provide the contractor with a concept note for the event specifying requirements for the location, capacity (i.e. no. of participants and speakers), duration, draft programme, and other relevant information, as well as a detailed list of support required from the contractor. In a kick-off session, the contractor and GIZ will then agree on a timeline for the preparation of the event.
- The contractor is responsible for selecting, preparing, training and steering the short and long-term experts assigned to perform the advisory 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.

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

Milestones	Timeframe
Provision of proposals for key elements (e.g. facilitator profiles, venue options, transport options, material)	Within 5 working days of GIZ providing the concept note and list of support required
Booking of venues, catering, facilitators, transport, and other requested support	Within 5 working days of GIZ approval
Provision of data and summary for post-event surveys	Within 10 working days of the event

Period of assignment: from 15 September 2024 until 31 March 2025.

3. Eligibility criteria

The bidder must fulfil the following eligibility criteria:

3.1 Commercial register entry

3.2 Average annual turnover for the last three financial years of at least R 1,200,000

3.3 Average number of employees and managers for the past three calendar years: At least 4 persons

3.4 The bidder must also provide examples of two (2) projects (conference and event management) with a minimum commission value of R 400,000 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 0 (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 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.

Project management of the contractor: The tenderer is required to explain its approach for coordination with the GIZ project (1.6.1).

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 events planning and management
- Coordinating and ensuring communication with S2PYEI, partners and others involved in the planning and implementation of events
- Personnel management, planning and implementing events and ensuring that flow of events is smooth
- Regular updating on progress
- Coordinate all aspects of the event planning and execution
- Develop detailed event timelines and schedules
- Ensure seamless communication and coordination between all stakeholders

Qualifications of the team leader

- Education/training (2.1.1): university degree (Bachelor) in Business Administration, Event Management or another relevant field
- Language (2.1.2): C1-level language proficiency in English
- General professional experience (2.1.3): 5 years of professional experience in event management
- Specific professional experience (2.1.4): 3 reference projects leading the management of an event for at least 50 participants in the capacity as team leader. Please specify the following in the CV: Name of the event, number of participants, duration of the event, location of the event, name of the entity on whose behalf the event was organised.

- Leadership/management experience (2.1.5): 3 years of management/leadership experience as project team leader or manager
- Regional experience (2.1.6): 5 years of experience in projects in South Africa (region)
- 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

- Logistic and administrative support in the planning, preparation and implementation of the events

Qualifications of the short-term expert pool

- Education/training (2.6.1): 2 experts with a certificate in event management
- Language (2.6.2): All experts with C1-level language proficiency in English
- General professional experience (2.6.3): 2 experts with 3 years of professional experience in event management
- Specific professional experience (2.6.4): 1 expert with 3 years of professional experience in supporting with logistical arrangements for events, 1 expert with 3 years of professional experience in providing administrative and secretarial support in the context of event management
- 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. 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.

Specification of inputs

Fee days	Number of experts	Number of days per expert	Total	Comments
Designation of Team Leader	1	30	30	
Designation of short-term expert pool	2-5		60	

Transport and travel	Quantity	Price	Total	Comments
Fixed travel budget	1	R100,000	R100,000	<p>A fixed budget of R100,000 is earmarked for settling travel expenses against evidence.</p> <p>Per diems are reimbursed at R490 per day.</p> <p>Carbon offsets of R 300 for in-country flights are reimbursed against evidence.</p> <p>All business travel must be agreed in advance by the implementation manager for the project.</p>
Other costs	Number	Price	Total	Comments
Flexible remuneration	1	R120,000	R120,000	<p>A budget of R120,000 is foreseen for flexible remuneration. Please incorporate this budget into the price schedule.</p> <p>Use of the flexible remuneration item requires prior written approval from GIZ.</p>
Fixed Workshops	1	R300,000	R300,000	<p>The budget contains the following costs:</p> <ul style="list-style-type: none"> • Venue booking • Accommodation for participants and speakers • Catering
Fixed Subcontracts	1	R200,000	R200,000	<p>The budget contains the following costs:</p> <ul style="list-style-type: none"> • Facilitators • Sign language interpreters • Fees or other costs for the online registration or post-survey evaluation platforms • Photography
Fixed Other costs	1	R100,000	R100,000	<p>The budget contains the following costs:</p> <ul style="list-style-type: none"> • Give-aways for participants • Stationary • Printing • Rental conferencing equipment • Name tags and lanyards • Decoration and communication material

				such as stage backdrop, pull-up banners etc
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Workshops and training

Please describe in your concept how you implement GIZ's minimum standards for sustainable event management (see annexes to the terms of reference).

The contractor implements the events described in Chapter 2. The exact number, size, duration, location and format of the workshops is uncertain at this time.

7. Inputs of GIZ or other actors

GIZ and/or other actors are expected to make the following available:

- Concept notes for the planned events
- Preparation of the programme of the events and briefing of speakers, facilitators, sign-language interpreters and other persons contributing to the implementation of the events
- Designs and print files for material such as roll-up banners, stage backdrops, and programmes
GIZ will share participants' full names, email addresses, and contact details with the contractor, if applicable, depending on the type of event.

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 6 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 3 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 (e.g. from respondents) may be entrusted to or collected by the contractor in order to fulfil the contract. Therefore, an agreement on "Outsourcing of data processing (AuV)" Annex 2 will be concluded with the contractor in accordance with Art. 28 GDPR. For this purpose, the technical and organisational measures (TOM) for compliance with the data

protection requirements must be outlined prior to conclusion of the contract. The contractor shall fill in the Auv and submit it with their tender documents. 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. Option

After the services put out to tender have been completed, important elements of these tasks can be continued or extended. Specifically:

Type and scope

The type and scope of the services are the same as described in chapter 2 of these ToR.

Requirements

Exercising the option will depend on additional need for the services of S2PYEI and the political partner. The decision on continuation is expected to be made by 30 November 2024. If the option is exercised, it is anticipated that the contract term will be extended to the end of the duration of the module.

The option will be exercised by means of a contract extension on the basis of the individual approaches already offered.

Quantitative requirements for the optional services

Fee days	Number of experts	Number of days per expert	Total	Comments
Designation of Team Leader	1	30	30	
Designation of short-term expert pool	2-5		60	
Transport and travel	Quantity	Price	Total	Comments
Fixed travel budget	1	R100,000	R100,000	A fixed budget of R100,000 is earmarked for settling travel expenses against evidence. Per diems are reimbursed at R490 per day. Carbon offsets of R 300 for in-country flights are reimbursed against evidence. All business travel must be agreed in advance by the implementation manager for the project.
Other costs	Number	Price	Total	Comments

Flexible remuneration	1	R120,000	R120,000	A budget of R120,000 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.
Workshops	1	R300,000	R300,000	The budget contains the following costs: <ul style="list-style-type: none"> • Venue booking • Accommodation for participants and speakers • Catering
Subcontracts	1	R200,000	R200,000	The budget contains the following costs: <ul style="list-style-type: none"> • Facilitators • Sign language interpreters • Fees or other costs for the online registration or post-survey evaluation platforms • Photography
Other costs	1	R100,000	R100,000	The budget contains the following costs: <ul style="list-style-type: none"> • Give-aways for participants • Stationary • Printing • Rental conferencing equipment • Name tags and lanyards • Decoration and communication material such as stage backdrop, pull-up banners etc

Requirements on the format of the tender for the option

Please complete both spreadsheets in the price schedule, i.e. one for the main service and one for the optional service.

11. Annexes

- Annex 1. Minimum standards for sustainable event management at GIZ
- Annex 2. Outsourcing of data processing (AuV)