

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



CONFERENCE EVENT MANAGEMENT SERVICE PROVIDER	Project number/ cost centre:
	22.2042.4-001.00

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0. List of abbreviations

AG	Commissioning party
AN	Contractor
AVB	General Terms and Conditions of Contract for supplying services and work
FK	Expert
FKT	Expert days
KZFK	Short-term expert
ToRs	Terms of reference

1. Context

The Department of Communication and Digital Technologies (DCDT) and its partners are hosting the annual National Digital and Future Skills Conference (NDFSC) on 20 and 21 November 2024. The conference aims to serve as a critical platform for dialogue on digital skills development, specifically focusing on South Africa's youth as a key demographic in the digital economy.

The NDFSC 2024 aims to bring together a diverse group of stakeholders including youth entrepreneurs, digital pioneers, policymakers, coders, makers, tinkerers, researchers, industry leaders, and civil society campaigners. The goal is to collectively explore evidence-based interventions, identify blind spots and bottlenecks, and evaluate strategies that have succeeded or failed in advancing South Africa's digital transformation.

The appointment of a service provider is essential for the successful execution of the NDFSC 2024. Given the scale and complexity of the event, a professional event management service provider will bring the necessary expertise and experience to handle all logistical, technical, and administrative aspects of the conference. This includes venue coordination, invitation management, speaker arrangements, website development, communication support, and more. The service provider's role is to ensure that every element of the conference is meticulously planned and executed, allowing DCDT and its partners to focus on the content and strategic goals of the event.

2. Tasks to be performed by the contractor

The contractor is responsible for providing the following services:

Work Package 1: Venue Coordination, Layout, and Branding

1. Venue Coordination

- **Tasks:**
 - Confirm venue booking and layout requirements.
 - Coordinate logistics with venue staff to ensure smooth operations during the conference.
 - Assist with the coordination of other side events of the conference.
- **Deliverables:**
 - Confirmation of venue booking and layout requirements.
 - Detailed logistics plan coordinated with venue staff.

2. Venue Branding

- **Tasks:**
 - Develop branding materials (banners, signage) in line with DCDT, NEMISAs, government partners and GIZ branding requirements.

- Implement branding elements at the venue to create a cohesive and professional environment, including set up and removal of branded material at the start and end of the conference.
- **Deliverables:**
 - Development and approval of branding materials (banners, signage).
 - Implementation of branding elements at the venue.

Work Package 2: Invitation Management

1. Stakeholder Invitations

- **Tasks:**
 - Prepare and send save the dates, invitations and reminders to relevant stakeholders based on contact lists provided, including government officials, industry experts, academics, and digital skills practitioners.
 - Manage the RSVP process and maintain an up-to-date database of invited and confirmed attendees, including dietary requirements, and special accommodation requests, e.g. need for sign language interpreters, wheelchair access, etc.
 - Request consent for photography from invitees.
- **Deliverables:**
 - List of prepared and sent invitations to relevant stakeholders.
 - Up-to-date database of invited and confirmed attendees.

Work Package 3: Speaker Confirmation

1. Speaker Coordination

- **Tasks:**
 - Send out invitations to speakers and manage their registrations. Speakers will be identified by programme developers and contact lists will be provided.
 - Confirm speaker availability, secure participation, and coordinate logistics including travel and accommodation.
- **Deliverables:**
 - List of invited speakers and their registration status.
 - Confirmed travel and accommodation arrangements for speakers.

Work Package 4: Accommodation and Travel Arrangements for Speakers

1. Travel and Accommodation

- **Tasks:**
 - Negotiate special rates with partner hotels for accommodation.
 - Coordinate travel arrangements for speakers including liaising on travel day and time, booking flights and organizing shuttle services with the organizers, and ensuring special requests are met (e.g. wheelchair access, etc) .
- **Deliverables:**
 - Special rates negotiated with partner hotels and made available to stakeholders.
 - Confirmed travel itineraries, accommodation bookings and shuttle arrangements for speakers.

Work Package 5: Conference Website Development

1. Website Development

- **Tasks:**
 - Develop and launch a conference website that serves as a platform for information dissemination (e.g. venue details and floor plan, programme, speakers profiles) and attendance confirmation. Ensure branding in line with DCDTs, NEMISAs and GIZ branding requirements. Get approvals from respective communication units before publication of website.
 - Ensure the website is user-friendly and accessible across different devices.
- **Deliverables:**
 - Live conference website with registration capabilities.
 - Usability test reports and cross-device compatibility checks.

Work Package 6: Communication Support

1. Communication Efforts

- **Tasks:**
 - Assist organizers with communication efforts to promote the conference.
 - Implement communication activities including social media posts, press releases, and newsletters.

- **Deliverables:**
 - Records of implemented communication activities and engagement metrics.

Work Package 7: Organization of Exhibition Area for Partners

1. Exhibition Coordination

- **Tasks:**
 - Plan and organize an exhibition area where partners can showcase their products, services, and initiatives related to digital skills.
 - Coordinate logistics for exhibitors including booth setup, signage, and technical requirements.
- **Deliverables:**
 - Detailed exhibition plan and setup checklist.
 - Coordination of exhibitor requirements and satisfaction survey results.

Work Package 8: Photography Services

1. Professional Photography

- **Tasks:**
 - Arrange for professional photography services to capture high-quality images of the conference.
 - Ensure proper documentation of the conference proceedings through photography and provide edited photos post-event.
- **Deliverables:**
 - Contract with professional photography service provider.
 - Delivery of high-quality edited photos and feedback from participants.

Work Package 9: Sign Language Services

1. Sign Language Interpretation

- **Tasks:**
 - Arrange for qualified sign language interpreters to provide services for deaf or hard-of-hearing attendees.
 - Ensure the availability of interpreters for all relevant conference sessions.

- **Deliverables:**
 - Contract with qualified sign language interpreters.
 - Schedule of interpretation services for all relevant conference sessions.

Work Package 10: Recording and Transcribing of Sessions

1. Session Recording and Transcription

- **Tasks:**
 - Organize recording services to capture all conference sessions including presentations, panel discussions, and workshops.
 - Ensure accurate and high-quality transcription of the conference proceedings.
- **Deliverables:**
 - Contract with recording service provider.
 - Delivery of accurately transcribed conference sessions.

Work Package 11: Event Streaming Services

1. Event Streaming

- **Tasks:**
 - Arrange for live streaming of conference sessions to enable remote participation.
 - Ensure high-quality streaming during the event.
- **Deliverables:**
 - Contract with streaming service provider.
 - Reports on streaming performance and feedback from online attendees.

Work Package 12: Conference Report Writing

1. Report Writing

- **Tasks:**

- Prepare a comprehensive conference report summarizing key discussions, outcomes, and recommendations.
 - Include an overview of the sessions, highlights, feedback received, and key takeaways from the event.
- **Deliverables:**
- Comprehensive conference report summarizing key discussions, outcomes, and recommendations.
 - Overview of sessions, highlights, feedback received, and key takeaways from the event.

Work Package 13: Appointment of Program Director

1. Program Director Appointment

- **Tasks:**
- Identify and shortlist potential candidates for the role of Program Director.
 - Consult with conference organizers to review and finalize the appointment.
 - Provide the appointed Program Director with all necessary information and support to fulfill their role.
- **Deliverables:**
- Shortlist of qualified candidates for the Program Director role.
 - Appointment of a Program Director in consultation with conference organizers.
 - Orientation and support provided to the Program Director to ensure they are fully prepared for their responsibilities.

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

Milestone	Actions
Milestone 1: Project Kick-Off	- Initial planning meeting with DCDT, DS4JI II, and key stakeholders. - Assignment of team leader and key experts. - Outline of the overall project timeline and major tasks.
Milestone 2: Venue and Logistics Confirmation	- Initial development of branding materials. - Coordination of logistics with venue staff.
Milestone 3: Invitations and Website Launch	- Distribution of invitations to stakeholders. - Development and launch of the conference website. - Ongoing updates and maintenance of the website.
Milestone 4: Speaker and Program Finalization	- Final confirmation of speaker participation and logistics (travel, accommodation).

Milestone	Actions
	<ul style="list-style-type: none"> - Begin detailed planning of the exhibition area for partners. - Appointment of the Program Director in consultation with conference organizers.
Milestone 5: Communication and Promotion	<ul style="list-style-type: none"> - Completion of communication support materials (social media posts, press releases, newsletters). - Implementation of media and communication activities. - Continued promotion of the conference through various channels.
Milestone 6: Final Preparations and On-Site Setup	<ul style="list-style-type: none"> - Final preparations for venue branding and setup, including setup in break out rooms if required. - Final logistics check with venue staff. - Setup of the exhibition area and implementation of branding elements.
Milestone 7: Conference Execution	<ul style="list-style-type: none"> - Execution of the National Digital and Future Skills Conference. - Live streaming of conference sessions. - Professional photography and sign language interpretation services. - Recording of all conference sessions. <p>Assist with any other side event of the conference, including the gala dinner.</p>
Milestone 8: Post-Event Deliverables	<ul style="list-style-type: none"> - Delivery of high-quality edited photos and recorded sessions. - Transcription of recorded sessions. - Preparation and submission of the comprehensive conference report.
Milestone 9: Project Closure	<ul style="list-style-type: none"> - Final evaluation and project review with all stakeholders. - Submission of all final deliverables, including the conference report. - Formal project closure and documentation of lessons learned.

Period of assignment: from 01 November 2024 until 31 March 2025

3. 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) and its contribution to the **results-based monitoring system** (1.3.2).

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. 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).

The tenderer is required to describe its contribution to knowledge management for the partner (1.5.1) and GIZ and to promote scaling-up effects (1.5.2) under **learning and innovation**.

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.

4. 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 7**), 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 advisory packages 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 local and international short-term experts
- Regular reporting in accordance with deadlines

Qualifications of the team leader

- Education/training (2.1.1): university degree (German 'Diplom'/Master) in Project Management, Event Management, Business Administration, or a related field.
- Language (2.1.2): C1-level language proficiency in English
- General professional experience (2.1.3): five years of professional experience in the project management, event coordination, or a related field. sector
- Specific professional experience (2.1.4): five years in in coordinating with multiple stakeholders, including government officials and industry experts.
- Leadership/management experience (2.1.5): five years of management/leadership experience as project team leader or manager in a company
- Regional experience (2.1.6): five years of experience in projects in Southern Africa (region), of which 2 years in projects in South Africa (country)
- Development cooperation (DC) experience (2.1.7): two years of experience in DC projects

Short-term expert pool with a maximum three 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

- Venue and Logistics Coordinator
- Communication and Registration Manager
- Technical Support and Website Developer

Qualifications of the short-term expert pool

- Education/training (2.6.1): six experts with university qualification (German 'Diplom'/Master) in Event Management, Communications, Computer Science, Information Technology, Public Relations, Marketing, Logistics, or Audio-Visual Technology.
- Language (2.6.2): six experts with C1-level of language proficiency in En
- General professional experience (2.6.3): six experts with two years of professional experience in the event management sector.
- Specific professional experience (2.6.4): six experts with two years of professional experience in event planning and coordination.
- Regional experience (2.6.5): six experts with two years of experience in Southern Africa (region), six experts with two years of experience in South Africa (country)
- Development cooperation (DC) experience (2.6.6): six experts with one years of experience in DC

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

5. Costing requirements

Assignment of personnel and travel expenses

Per-diem and overnight accommodation allowances are reimbursed as a lump sum up to the maximum amounts permissible under tax law for each country as set out in the country table in the circular from the German Federal Ministry of Finance on travel expense remuneration (downloadable at <https://www.bundesfinanzministerium.de>).

Accommodation costs which exceed this up to a reasonable amount and the cost of flights and other main forms of transport can be reimbursed against evidence

All business travel must be agreed in advance by the officer responsible for the project.

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. For short distances, travel by train (second class) or e-mobility should be the preferred option.

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.

There are many different providers in the market for emissions certificates, and they have different climate impact ambitions. The [Development and Climate Alliance \(German only\)](#) has published a [list of standards \(German only\)](#). GIZ recommends using the standards specified there.

Specification of inputs

Fee days	Number of experts	Number of days per expert	Total	Comments
Designation of Team Leader	1	30		
Designation of short-term expert pool	3	15		

Travel expenses	Quantity	Number per expert & Price	Total	Comments
Per-diem allowance in country of assignment	6			
Overnight allowance in country of assignment	6			
Transport	Quantity	Number per expert & Price	Total	Comments
Fixed travel budget	6	3	R90 000	<p>A fixed budget of ZAR 5000 is earmarked for settling travel expenses against evidence.</p> <p>You can find further information on the travel expense budget in the 'Price schedule' document. Please use the 'Explanations' column in the price schedule to break down the individual items. Settlement is possible only until the budget is depleted.</p>
Other costs	Number	Price	Total	Comments
Flexible remuneration	1	R203,896	R203,896	<p>A budget of ZAR 203 896 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>
Subcontracts	1	Program Director: Sign interpreter: Photography:		<p>The budget contains the following costs:</p> <ul style="list-style-type: none"> • Program Director • Sign Interpreter • Photography

Procurement of materials and equipment	350		<p>The budget contains the following costs:</p> <ul style="list-style-type: none"> • Conference banners • Conference name tags • Lanyards
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6. Inputs of GIZ or other actors

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

- Funding and Budget Oversight
- Technical Assistance
- Stakeholder Engagement
- Communication and Promotion

7. 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 20 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 CVs of the personnel proposed in accordance with Chapter 4 of the ToRs must be submitted using the format specified in the terms and conditions for application. The CVs shall not exceed 4 pages each. They 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.

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.