

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

Event management support: Organization and implementation of 20 hydrogen/PtX events in South Africa	Project number/ cost centre: 2021.2230.7-001.00
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0. List of abbreviations

AVB	General Terms and Conditions of Contract ('local terms and conditions') for supplying services and work on behalf of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH in South Africa from 2022.
BMZ	German Federal Ministry for Economic Cooperation and Development
DC	Development Cooperation
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit GmbH
H ₂	Hydrogen
H2.SA	Promoting a Green Hydrogen Economy in South Africa
IC	International Cooperation
PtX	Power-to-X
ToRs	Terms of reference

1. Context

The Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH is an international cooperation enterprise for sustainable development with worldwide operations. Its corporate objective is to improve people's living conditions on a sustainable basis.

In the context of a rapidly decreasing global carbon budget and urgency to identify adequate solutions for decarbonizing the so-called hard-to-abate sectors, the demand for green hydrogen (H₂) and hydrogen-based products, such as ammonia and synthetic jet fuels, is steadily increasing.

The renewed discussion on H₂, Power-to-X (PtX) and their production in the partner countries of International Cooperation (IC) has clearly gained momentum in the course of global decarbonisation and efforts. This is reflected both in increased political activity (e.g. National Hydrogen Strategy in Germany) and in GIZ's commissions on this topic.

Many off takers (e.g., Germany, the EU, Japan, etc.) are willing to pay a premium price and to sign long-term supply agreements to stimulate green H₂/PtX market development. An essential pre-condition for a green hydrogen economy would be the massive development of low-cost renewable energy capacities and to this end, existing market barriers would need to be removed, the political and regulatory framework would need to be adjusted and a far-reaching capacity building, skills development and training initiative implemented.

Based on discussions with the German Federal Ministry for Economic Cooperation and Development (BMZ) and representatives of the South African government in late 2019, GIZ developed a concept for the project "**Promoting a Green Hydrogen Economy in South Africa**" (H₂.SA), to be implemented between August 2021 and December 2023.

H₂.SA has four focal areas:

Strategy Development and Framework	Green H ₂ Sector Development	Research, Innovation and Training	Sustainability and Just Energy Transition
Supporting policy and regulatory framework conditions for a green hydrogen economy.	Supporting actors to build a hydrogen export economy.	Enhancing capacity and knowledge of South African stakeholders in the H ₂ /PtX sector.	Mitigating the potential implications of a H ₂ /PtX economy on the environment, society, and the economy.

Against this backdrop, events are essential to establish personal connections with partners and to raise awareness among the target groups. Further, they are an effective method for the project to build trust and form an emotional connection.

For the efficient and effective conduction of events (incl. conferences, information/ awareness raising events, stakeholder consultations, trainings), the support of an experienced event management agency is indispensable. **Therefore, GIZ is seeking support from an event management agency to organise the preparation and implementation of (online/offline) events including but not limited to conceptual design & planning, general coordination, the arrangement of venue, travel & accommodation, sourcing of external moderators, branding, communication services, event evaluation and general logistical needs for H₂/PtX events in South Africa.**

2. Tasks to be performed by the contractor

The contractor is responsible for providing the following services:

Event Management

1) *Overarching*

- Prepare and manage a project management plan that outlines the names of the task managers, the timeline with the number of working days, all milestones with respective responsibilities and delivery dates. This plan should be aligned with the H2.SA operation plan, be regularly updated and made available;
- Serve as a focal point for and coordinate with all relevant suppliers (hotels, drivers, catering, decorators, printers, audio-visual and light technicians, etc.) involved in the technical, logistical and administrative arrangements of the events;
- Management of sub-contractors (where applicable): travel management company, transportation, accommodation, communication and deployment, directional signage, design and production, translators and interpreters;
- Provision and/or selection of moderators and photographer (if necessary);
- Being able to develop and present an event hybrid model (if necessary);
- Management of hybrid events as and when required pending changes in COVID-19 regulations;
- Develop, design and manage an online resource centre that will serve as a registration portal, content hub, as well as communication dissemination tool for critical information to attendees;
- Support the project management team of H2.SA with additional tasks related to the events;
- Liaise with GIZ's appointed design/marketing agency to ensure brand consistency on all platforms and on all collateral;
- Documentation of events according to H2.SA's event monitoring system and post event reporting on all deliverables and targets including financials;
- Communications: In consultation with GIZ, produce all pre, during and post event communication content and PR material where necessary;
- The technical capabilities and infrastructure to cater for pure virtual & hybrid model conferencing (e.g. Live Stage/Streaming, Breakaway rooms, Networking platforms which include capabilities to host Panel Discussions, Conferencing Press Rooms et al).
- Participate in the bi-weekly coordination meetings with the H2.SA team, the quarterly operational planning sessions and on a needs basis (if requested).
- The contractor implements all services in line with the GIZ Sustainable Events Management Guidelines.

2) *Before the event*

- Participant and travel management (in close coordination with H2.SA team)

- Flights and hotel bookings will be arranged by GIZ. Contractor has to provide complete passenger/guest list with all necessary data.
- Design and produce name badges for all participants, speakers;
- Send logistical note including information to all participants (arrival/departure details, hotel booking, visa requirements, etc.), and offer help desk for participants (if needed);
- Airport reception and ground transport
 - Check flight times with travel agents (if needed);
 - Organize a minibus / van for airport transfers to pick up participants considering protocol arrangements.
 - Ensure staffing at the airport and in the hotels to facilitate participant arrival and registration;
- Coordinate with all relevant suppliers involved in the technical and logistical arrangements;
- Briefing of the project team (GIZ staff, suppliers, service providers etc.). Frequency to be determined by the magnitude of the event.

3) At the event

- During the event, work closely with the GIZ project management team to ensure smooth implementation of the event including participant arrival and registration (international and local), accommodation, stage set up, seating, food and beverages, lunches and dinners;
- Reception, registration, guidance:
 - Prepare an electronic registration list with columns for names, organization, email address, signature for all training days; GIZ participation list template will be provided;
 - Set up and staff registration area with tables to ensure timely information of participants upon arrival;
 - Provide guidance during the reception in the morning and for all coffee and lunch breaks;
 - Distribute prepared materials and other information such as the conference kit.
- Conference venue arrangements:
 - Arrange and ensure that the meeting room is arranged according to specifications and ready as required per agenda and schedules;
 - Coordinate with GIZ project management team for the desired set up at the venue and ensure that the venue is prepared and set up with the necessary event collateral and amenities;
 - Security: work closely with the available security personnel to ensure that event and the guests are well secured. Security protocols of the venue must be provided and/or briefed to all participants at the start of the event;

- Check seating arrangements, meeting facilities and availability of conference equipment (flip charts, beamer, etc.);
- Meal provision/ subsistence (if necessary):
 - Meal provision should be coordinated in close cooperation with the GIZ project team; in many cases it is already included in the hotel booking or conference package.
 - As a general rule for avoiding the payment of per diems to reduce administrative effort: breakfast and lunch to be included for 1 day events and dinner to be included for events with overnight stay; GIZ's travel regulations apply.
 - Dietary requirements of the participants should be considered (e.g. vegetarian, vegan, pescatarian, gluten-free etc.)
 - All meals should be accompanied by a maximum of two beverages (soft drinks) per person
 - The use of plastic should be reduced to an absolute minimum in line with GIZ's Sustainable Events Management Guide;
- Technology / equipment:
 - Arrange and ensure availability of audio-visual equipment in the conference room (beamer, sound box, etc.);
 - Arrange lighting technology / stage production services (if needed);
- PR and communication (if necessary):
 - Produce media footage of the event (photos, small articles, interviews);
 - Help to distribute material through appropriate media channels (e.g., social media, local press, etc.)

4) After the event

- Follow-up on participant list (need to be filled out completely);
- Support post-event activities including circulation of training satisfaction surveys to participants, electronic files (e.g. attendance register, speaker presentations).

Further requirements based on formulated demand by the project management team.
The event management agency shall provide responsive and efficient service at all times to fulfil the respective requirements of GIZ. Telephone calls and emails should be answered within 1 day and the agency must avail themselves for afterhours emergencies.

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

Milestone	Description	Deadline
Kick-off Meeting between GIZ and consultancy	Pretoria 2-hour meeting	October 2022

Develop project/event management plan aligned with planned H2.SA activities		October 2022
Participate in H2.SA's quarterly Operation Plan (organized by GIZ)	Pretoria ½ day event	January - December 2023
Support H2.SA's contribution/part (up to 10 side events, break-out sessions) to 2 international high-level conference in Cape Town.	Cape Town 3-day event; up to 500 guests H2.SA side-sessions between 20 – 50 participants each	27-30 November 2022 and November 2023
6 After Work social events	Johannesburg or Pretoria Evening event Up to 50 guests	January - December 2023
12 general project events (trainings, information event, consultation & dialogue, etc.)	Gauteng, Northern, Western, Eastern Cape (and others) Up to 2 days Up to 50 participants	January - December 2023

Period of assignment: From 24.10.2022 until 31.12.2023.

3. Concept

In the bid, the bidder is required to show how the objectives/tasks 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 and provide supporting evidence of a previous similar system developed by the bidder.

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) (assessment grid criteria 1.1.1). 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) (assessment grid criteria 1.1.2).

The bidder is required to present the actors / sub-contractors relevant for the services for which it is responsible and describe the **cooperation** with them (assessment grid criteria 1.2.1).

The bidder is required to present and explain its approach to **steering** the measures with the project partners (assessment grid criteria 1.3.1) and its contribution to the results-based monitoring system (assessment grid criteria 1.3.2).

Other specific requirements

In addition to the technical concept, the bidder is required to submit a business profile that details the bidder's experience in the MICE sector and evidence of previous events and contactable references of previous or existing clients (assessment grid criteria 1.7).

Project management of the contractor

The bidder is required to explain its **approach** for coordination with the GIZ project (assessment grid criteria 1.6.1).

- The contractor is responsible for selecting, preparing, training and steering the experts assigned to perform the advisory tasks.
- 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 general terms and conditions of contract ('local terms and conditions') for supplying services and work on behalf of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH in South Africa from 2022.

The bidder is required to draw up a **personnel assignment plan** (assessment grid 1.6.2) 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** (assessment grid 1.6.3). The following services are part of the standard backstopping package.

4. Personnel concept

The bidder 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.

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 qualification (National or International Diploma, Bachelor, Master or equivalent) in Event Management and / or Logistics Management and/or Travel and Tourism Management
- Language (2.1.2): Good business language skills in English
- General professional experience (2.1.3): 10 years of professional experience in the meetings, incentives, conferences and events (MICE) sector
- Specific professional experience (2.1.4): 5 years in organizing hybrid/online events
- 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 projects in Southern Africa
- Development Cooperation (DC) experience (2.1.7): Not applicable
- Other (2.1.8): Not applicable

Expert 1

Tasks of expert 1

- All event management tasks as outlined in chapter 2.

Qualifications of expert 1

- Education/training (2.2.1): University qualification (National or International Diploma, Bachelor or equivalent) in Event Management and / or Logistics Management and/or Travel and Tourism Management
- Language (2.2.2): Good business language skills in English
- General professional experience (2.2.3): 7 years of professional experience in the meetings, incentives, conferences and events (MICE) sector
- Specific professional experience (2.2.4): 2 years in organizing hybrid/online events
- Leadership/management experience (2.2.5): Not applicable
- Regional experience (2.2.6): 5 years of experience in projects in Southern Africa
- Development Cooperation (DC) experience (2.2.7): Not applicable
- Other (2.2.8): Not applicable

Expert 2

Tasks of expert 2

- All event management tasks as outlined in chapter 2.

Qualifications of expert 2

- Education/training (2.2.1): University qualification (National or International Diploma, Bachelor or equivalent) in Event Management and / or Logistics Management and/or Travel and Tourism Management
- Language (2.2.2): Good business language skills in English

- General professional experience (2.2.3): 5 years of professional experience in the meetings, incentives, conferences and events (MICE) sector
- Specific professional experience (2.2.4): 2 years in organizing hybrid/online events
- Leadership/management experience (2.2.5): Not applicable
- Regional experience (2.2.6): 5 years of experience in projects in Southern Africa
- Other (2.2.8): Not applicable

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
- Events industry networks and relationships

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

5. Costing requirements

Assignment of personnel

Team leader: On-site assignment for 30 expert days

Expert 1: Assignment in country of assignment for 105 expert days

Expert 2: Assignment in country of assignment for 105 expert days

Travel

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

- Flight costs – 30 economy return flights
- Accommodation – 70 nights
- Per Diem – 70 days
- Airport transfers – 30 return trips
- Car Hire – 30 days
- Mileage – 1500 kilometers

Events

The contractor implements the following events:

- 2 International Conferences in Cape Town with national and international high-level guests. The event is organized by one of H2.SA's political partner. H2.SA contributes a series of trainings, side-events or breakout sessions which will be organized by different

Technical Experts and affiliated project partners. The technical team needs support for the overall coordination of the process and for participant/travel management, logistics, venue arrangement and supplier management.

The venue (CCCC in Cape Town) is **already booked** and all costs will be covered by GIZ.

- 6 after work evening events with up to 50 guests in Johannesburg or Pretoria. Events should be business-casual and in one of the city's trendy locations (bar, restaurant, preferably with outside area). The event should include on short input presentation from South African leaders (public, private, media, research, civil society) related to green hydrogen/just transition. Drinks and snacks should be served.
- 12 general project events including, but not limited to trainings, information event, stakeholder consultation, etc. Depending on the COVID19 regulations and global and local circumstances, events may be held physically or virtually. Some events might only be webinars, while others can range from 1-2 days. The type of events will be defined at a later stage with the GIZ team

All events should be – if possible – sustainable and green (minimize environmental impact, use sustainable material, etc.). Refer to the GIZ Sustainable Event Management Guide.

The budget estimate for the events including venue hire (except for the 2 international conferences), catering, transport, logistics, etc. must be included in the bidder's financial proposal.

Flight and accommodation costs for H2.SA staff and event high level government (Presidency) participants will be booked and paid for by GIZ and must not be included in the bidder's financial proposal (only include own flight and accommodation costs).

The budget estimate for the 12 general events should be based on a scenario where 50% are organized as a hybrid model.

Other costs

- Printing costs
- Production cost, material costs for communication material
- Hosting and maintenance costs for IT platform (e.g. registration platform, internet/media platforms, etc.)
- 3rd party suppliers: ground transport for event participants, moderator, photographer, etc.

Flexible remuneration item

ZAR 122,137.00 flexible remuneration. Note that the use of the flexible remuneration is subject to approval by the GIZ and can only be used in support of activities outlined in this ToR. Inputs of GIZ or other actors

6. Inputs of GIZ or other actors

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

- Technical input for trainings, side-sessions, break-out session
- List of participants and guests H2.SA wants to be invited
- Flight bookings for guests and GIZ staff (costs covered by GIZ)
- Corporate logos and design requirements
- Internal event, travel, and communication guidelines (GIZ Cooperation Logo Design Manual and Corporate Design Centre website - <https://www.giz.de/cdc/en/html/index.html>)
- Content for communication material

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.

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

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. The CVs must clearly show the position and job the proposed person held in the reference project and for how long. The CVs can be submitted in English.

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.

Other Requirements

- Please submit your proposal (technical and price proposal) in separate files/folder to ZA_Quotation@giz.de no later than **10.10.2022**, 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. Data Protection

The performance of the contract may be associated with the processing of personal data by the contractor, who would alone define the nature of such data and how such processing would be carried out. In such cases, the contractor shall act as an independent DATA CONTROLLER and must alone comply with ALL applicable data protection obligations, including regional and local laws. The contractor must process personal data only when a given goal cannot be reasonably attained without such data. The data protection principles such as lawfulness, data minimization, accuracy, purpose limitation, storage limitation, transparency, integrity and confidentiality, and accountability, as well as the numerous rights of the data subject must be paid due attention. The GDPR's data transfer rules must be considered whenever personal data leaves the EU for a third country. The GIZ is NOT in any way responsible for such processing.

9. Annexes

1. H2.SA Project Factsheet
2. GIZ (2018): Guide – Sustainable Event Management