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

Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH

NTO Technical Conference 2023: Event management and support for hybrid format	**Project number/ cost centre:** **19.2032.1-007.02**

0.   List of abbreviations

AG   Commissioning party

AN   Contractor

AVB   General Terms and Conditions of Contract for supplying services and work

ToRs   Terms of reference

DRM   Domestic Revenue Mobilisation

GIZ   Deutsche Gesellschaft für Internationale Zusammenarbeit GmbH

ITC   International Tax Compact

NTO   Network of Tax Organisations

1. Context

Background

In December 2019, the German Federal Ministry of Economic Cooperation and Development (BMZ) mandated the Deutsche Gesellschaft für Internationale Zusammenarbeit GmbH (GIZ) with implementing the Sector Programme Good Financial Governance (SP GFG). The European Union is co-funding the SP GFG for the period of July 2022 until June 2025. The sector programme advises BMZ on conceptual and methodological aspects in topics related to public finances, such as taxation, budget, administrative reforms, and financial control. The aim of the sector programme is to further develop the German approach to Good Financial Governance (GFG) and establish it more strongly in the international context.

The International Tax Compact (ITC) is one work stream of the SP GFG. The ITC is a provider of secretarial services for result-oriented initiatives in the area of tax and development. The ITC facilitates the secretariats of two international initiatives. The Network of Tax Organisations (NTO) is one of these initiatives.

The **Network of Tax Organisations (NTO)** is a **network of regional and international tax organisations** that aims to develop and promote effective tax systems to contribute to the well-being of people. It acts as a **global platform** for the exchange of experiences, knowledge, and best practices on tax administration matters.

The following regional and international tax organisations are members of the NTO:

- African Tax Administration Forum (ATAF) www.ataftax.org
- Association of Tax Authorities of Islamic Countries (ATAIC)
- Centro Interamericano de Administraciones Tributarias (CIAT), www.ciat.org
- Commonwealth Association of Tax Administrators (CATA), www.catatax.org
- The Caribbean Organisation of Tax Administrators (COTA), www.caricom.org
- Cercle de réflexion et d'échange des dirigeants des administrations fiscales (CREDAF), www.credaf.org
- Intra-European Organisation of Tax Administrations (IOTA), www.iota-tax.org
- Pacific Islands Tax Administrators Association (PITAA), www.pitaa.org
- West African Tax Administration Forum (WATAF), www.wataf-tax.org

Since its launch, the NTO has achieved major milestones in its institutionalisation and frequently hosts hybrid and virtual events for the purposes of networking and peer-learning. One of these flagship events was the first virtual NTO Technical Conference in October 2021, which was well received by participants.

Building on the Network's success and momentum, the 2nd NTO Technical Conference on the theme of digitalisation of tax administrations is expected to take place from 05-07 September 2023 online and in Cape Town, South Africa. It will be a three-day hybrid event, with in-person participation integrated with live stream and virtual participation.

The conference will be hosted by the African Tax Administration Forum (ATAF), and jointly organised by ATAF and the International Tax Compact (ITC) which facilitates the NTO secretariat. A host agreement for this hybrid conference was drawn up with ATAF to establish the conditions of the organisation and hosting of the technical conference.

In the host agreement between the ITC and ATAF, it was projected that there would possibly be up to 200 in-person attendees and an additional 1000 virtual attendees. A more accurate confirmation of the number of participants will be provided by mid- to end-August 2023. It is expected that due to the accessibility of online participation, virtual attendees will be larger than that of physical attendees. Registration of the conference will be done online via the ATAF website. ATAF is also the organiser of the venue in Cape Town and will oversee logistics related to in-person aspects of the conference.

The conference languages will be English, French and Spanish, all input will be translated into English/French/Spanish.

There are certain aspects of the planned hybrid conference that should be noted:

- A pre-selected moderator will be present at the venue throughout the conference
- It is expected that some speakers/panellists will only be able to participate online (panel speakers in some sessions may comprise a mix of both online and in-presence speakers who would need to interact with each other)
- There will be a total of 6 plenary sessions and 4 breakout sessions
- The parallel breakout sessions will be taking place (no more than two at a time)
- All 6 plenary sessions will include a presentation, panel discussion, open discussion/Q&A
- All plenary and breakout sessions in the conference should also integrate the online audience and ensure that they have an opportunity to participate in Q&A rounds

The preliminary agenda of the conference has been set and is planned as follows:

Day One: Tuesday 05 Sep 2023 (starting after lunch)	- Welcome by event moderator (15mins) - High-level opening remarks (45mins) - Break (15mins) - Plenary session 1 (1h30mins) - Break (15mins) - Plenary session 2 (1h30mins)
Day Two: Wednesday 06 Sep 2023	2 parallel breakout sessions (1h30mins) - Lunch (2hrs) - Welcome to day 2 by event moderator (15mins) - Plenary session 3 (1h30mins) - Break (30mins) - Plenary session 4 (1h30mins)
Day Three: Thursday 07 Sep 2023	2 parallel breakout sessions (1h30mins) - Lunch (2hrs) - Welcome to day 3 by event moderator (15mins) - Plenary session 5 (1h30mins) - Break (30mins) - Plenary session 6 (1h30mins) - Closing remarks (30mins)

The consultancy/service provider will support the conference planning team in identifying and setting up a virtual platform for the hybrid event. They will then train speakers, participants and other identified role-players on the use of the platform (and other associated online tools); and facilitate all digital platform logistics during the conference at the venue and online to ensure that the virtual component is seamlessly integrated into the conference for all attendees.

The consultancy is advised to participate in a voluntary briefing/information session held by GIZ two weeks before the submission of final proposals is due.

2. Tasks to be performed by the contractor

The contractor shall support the implementation of the hybrid and virtual component of the 2nd NTO Technical Conference.

The contractor is responsible for providing the following services:

- Identifying and procuring a suitable virtual platform and other related online tools (details below) based on specifications defined by GIZ and ATAF for hybrid use during the 2nd NTO Technical conference
- Support the setting up of the virtual platform according to the needs of the conference
- Familiarise themselves with the chosen virtual platform (and other associate online tools) and provide relevant training to speakers/presenters on the use of the platform/online tools
- Preform dry/practice runs for all online speakers/panellists/presenters in the weeks leading up to the conference
- Provide support during the three-day conference, troubleshoot connection difficulties both for online attendees and participants at the venue
- During the conference, coordinate all speakers/panellists who are participating virtually, by ensuring that they join online 30 minutes before their session and carry out mic/sound/connection checks.
- Support virtual participants if they have technical difficulties and ensure that the online audience is taken care of throughout the conference.
- Debrief organisers after the conference on reflection/lessons learnt from the coordination of hybrid format

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
Inception meeting	1 week from start of contract
Procurement of virtual/webinar platform	2 weeks from the start of contract
Procurement of supporting equipment	Ready one week before start of conference
Updates and feedback loops	Continuous, throughout the contract
Training of speakers/presenters/panellists on virtual platform	To commence at least one month before start of conference (7 August 2023)
Series of group dry/practice runs on virtual/webinar platform	To commence at least 3 weeks before start of conference (15 August 2023)
Setting up/familiarisation of conference venue	Week beginning 28 August 2023

Virtual and in-presence support during conference for hybrid format	5 to 7 September 2023 in Cape Town
Debriefing to organisers (ATAF and GIZ) on hybrid support	After conference, week of 11 September 2023

Period of assignment: from 01 August 2023 until 30 September 2023.

Below is an elaboration of the tasks and services required from the contractor.

<u>On identifying and procuring a virtual platform</u>:

The contractor is expected to assist ATAF and the NTO secretariat in identifying and procuring a platform to accommodate the virtual aspects of the hybrid conference. The virtual platform needs to have the following features:

- Be accessible from within firewalls
- Easy to access for government officials from their respective countries
- Compatible with low bandwidth and user-friendly
- Accommodate live feeds for simultaneous interpretation
- Accommodate live (on the platform) virtual breakout rooms which mirror the breakout sessions at the conference venue
- Accommodate interactive participation for online attendees such as for polls, live chat and webinar tools
- Allow for the downloading of material (publications, presentations etc) which may be uploaded by NTO members at their exhibition booths or in a virtual briefcase
- Allow for pre-recorded videos to be played to the online audience
- Allow for the creation of virtual spaces such as auditorium rooms, break out rooms, lobby and exhibition booths
- Allow for the integration of live stream in the platform
- Custom domain for the conference
- Allow graphical customisation according to the needs to conference organisers
- Allow for statistical information on participation (both for registrations and actual attendance)
- Embedded survey
- Allow for up to 1000 concurrent attendees on the platform
- Compliance with General Data Protection Regulation (GDPR)[1]

<u>Training speakers/presenters on the hybrid format</u>

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[1] 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 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. 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. *For more information see Data Protection* and *Requirements on the format of the bid.*

The consultancy will schedule individual appointments with all speakers, panellists and presenters who will be attending online on how to use the online formats related to the virtual platform. They should ensure that all online speakers feel comfortable with the online tools they are expected to use.

They will also arrange group and if necessary individual dry runs with online speakers to ensure they are well versed with all the features of the online platform and gain a sense of familiarity on how their plenary or breakout session will be implemented in hybrid format.

Training for online aspects of the hybrid format should commence latest three weeks before the start of the conference (or earlier if possible). The service provider also needs to ensure that all short-term experts involved in the conference are themselves familiar with all online tools.

Technical equipment/support for on-site aspects related to hybrid setup:

In collaboration with the venue provider and the translation/interpretation service provider, the event management service provider should provide on-site support.

The consultancy needs to provide:

- Independent internet connection for video streaming to online participants of up to 300mps (should have its own independent power source/ups)
- Independent internet connection for streaming of interpreters (language channel) of 150mps (should have its own independent power source/ups)

One technician/production assistant from the service provider needs to be at the venue to assist the online participants/speakers and support the integration of the digital and in-person components throughout the conference.

The consultancy/service provider will be asked to sign a data processing agreement (attached in the annex)

Support implementation of online and on-site aspects related hybrid format during the conference:

The consultancy should provide support for both the online format and on-site during the conference. One team of *up to* six people will be online for the entire duration of the conference (this should be done remotely, without having to travel to the conference venue).

The online support team will be active and available during the hybrid event. Their tasks include:

- Ensuring that speakers joining online are connected 30mins before the start of their session
- Supporting speakers who are connecting online, should they experience technical difficulties
- Assisting with connection issues or other technical difficulties that may be experienced by online attendees
- Liaising with the technician/production assistant and organisers at the venue to ensure smooth integration of in-presence activity with online participation
- Taking care of and providing guidance to the online audience

- Moderation of online audience chats and interactions[2]

One "on-site" technician/production assistant from the consultancy/service provider, will be present at the conference venue and will support the hybrid event by:

- Ensuring all technical equipment is working and connected to live streams, ensure integration with interpretation service provider.
- Liaising with the "online team" and conference organising team to ensure that connection challenges do not arise from equipment issues on-site
- Assist with sound check of virtual speakers to on-site venue before the event (online speakers streaming into conference onsite)

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 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).

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[2] Online audience/ participants will be limited to sending/typing chats, and will not be permitted to share their screens, show video or send images, or to send voice notes/ turn on their mics. Only identified online speakers, presenters and panelists will be permitted to share their screens and use their cameras/mics.

Project management of the contractor (1.6)

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 bidder shall provide proof of the following:

Experience:

-The event management agency will have at least 5 years' experience in South Africa

-Proven experience of using and managing virtual platforms for large virtual and hybrid events, which comprise interactive elements with online audiences, preferably for corporate clients, government entities and/or international organisations

-Proven specific experience of managing hybrid conferences preferably for government entities and/or international organisations

-Previous experience working with clients in the public sector/government entities, international organisations

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 short term experts (online support team as well as the on-site technician/production assistant) the available budget, as well as planning and steering
- Regular reporting/feedback loops in accordance with agreed timelines
- Supporting the needs of online audience and speakers during the conference

Qualifications of the team leader
- Education/training (2.1.1): Tertiary education in humanities, law, computer science, project management or similar remit
- Language (2.1.2): C2, native level language proficiency in English, working knowledge of French and Spanish would be an advantage
- General professional experience (2.1.3): 7 years of professional experience in project management, marketing, events management and/or similar remit
- Specific professional experience (2.1.4): 5 years in event management working on high-level conferences, specifically for government entities and international organisations,
- Leadership/management experience (2.1.5): 3 years of management/leadership experience as project team leader or manager in a company, coordination of remote online teams for virtual and hybrid events
- Development cooperation (DC) experience (2.1.7): 2 years of experience in DC projects
- Other (2.1.8): proven experience in management of at least 2 hybrid and virtual events, and show previous projects using specific virtual platforms and online tools

Key expert 1

Technician/production assistant supporting on-site at the conference venue

Tasks of key expert 1
- Expert will be on-site for the duration of the conference to support technical issues related to online speakers (streaming into the event)
- Check technical equipment and liaise with interpretation service provider
- Perform sound checks with virtual speakers to on-site venue before the event (online speakers streaming into conference onsite)
- Support "online team" with any issues related to technical equipment

Qualifications of key expert 1
- Education/training (2.2.1): Tertiary education or training at technical college, equivalent to NQF 5 or above
- Language (2.2.2): C2, Fluency in English with ability to work with non-native English speakers
- General professional experience (2.2.3): 2 years roven experience in working with audio/visual equipment
- Specific professional experience (2.2.4): Proven experience with at least 2 hybrid events involving high level speakers, demonstrated professionalism when working with high-level delegates an added advantage

Soft skills of team members
In addition to their specialist qualifications, the following qualifications are required of team members:
- Team skills and initiative
- Communication skills and socio-cultural skills
- Proven experience in supporting virtual events and strong expertise on the use of online meeting platforms
- Experience in training and briefing high level speakers on the use of online meeting platforms and virtual platforms
- Additional fluency in French and Spanish in at least 2 members of short-term expert pool is strongly desired

Short-term expert pool with minimum 4, maximum 6 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
- Familiarising themselves on the use of the chosen virtual platform and other associated online tools
- Scheduling and training online speakers on the use of virtual platform/online tools and performing dry runs in advance/ in the weeks leading up to the conference
- Supporting the needs of the online audience during the conference
- Coordinating with online speakers before each session, trouble-shooting connection/technical issues, supporting speakers during their sessions
- Monitoring/moderation of live chat and responding to live chat during conference

Qualifications of the short-term expert pool
- Education/training (2.6.1): 6 experts with university qualification bachelor's degree or equivalent in humanities, law, commerce, IT or similar remit
- Language (2.6.2): All experts with C2-level language proficiency in English
- General professional experience (2.6.3): All experts with 2 years of professional experience in online/moderation support for hybrid and virtual conferences,
- Specific professional experience (2.6.4): All experts with 2 years of professional experience in working with online tools related to virtual/webinar conference events
- Other (2.6.7): 1 expert with additional working fluency in French and 1 expert with additional working fluency in Spanish

The contractor/service provider must provide a clear overview of all proposed short-term experts and their individual qualifications.

5. Costing requirements

Assignment of personnel and travel expenses

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

Specification of inputs

Fee days	Number of experts	Number of days per expert	Total	Comments
Designation of Team Lead	1	25	25 days	Team leader should regularly provide updates at NTO-ATAF joint meetings on project implementation status. And has the overall responsibility of coordinating the short term expert pool and the key expert.
Designation of key expert	1	5	5 days	Should be based in Cape Town. Additional travel costs not provided for
Short-term expert pool	6	14	84 days	Out of the short-term expert pool, this contract requires at least one expert with Spanish as an additional language and one expert with French as an additional language if possible.
Other costs: **Virtual platform and related online tools**			5 days	This contract requires to procure Virtual platform and related online tools as well as one hiring of equipment (such

Hiring of equipment (independent internet connection, 2 lines)				as independent internet connection, 2 lines).
Flexible remuneration				A budget of ZAR **93 887.00** 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.

6. Inputs of GIZ or other actors

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

- GIZ and ATAF will provide guidance on hybrid concept and will offer service provider a list of online speakers who may need individual or group training on the use of online tools and/or the virtual platform
- Service provider will work with ATAF and the interpretation/translation company to ensure seamless integration of equipment
- ATAF will host the conference and is responsible for coordination/logistics related to the venue
- GIZ may provide additional support (drawn from current GIZ employee pool in the ITC) for online aspects of the conference

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 (language).

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 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 (language).

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.

8. Data Protection

The execution of the contract is associated with processing of personal data by the contractor for the Client. Such data processing shall always be carried out only on behalf of and in accordance with the instructions of the GIZ management. Therefore, the GIZ management team and the contractor will conclude a contract for order processing (AuV) in accordance with Article 28 GDPR. For this purpose, the bidder must set out the technical and organisational measures (TOM) for compliance with the data protection requirements prior to conclusion of the contract. After a positive check, the contract is concluded with the AuV attachment.

0. Other Requirements

- Please submit your proposal (technical and price proposal) in separate files/folder to ZA_Quotation@giz.de no later than **14th July 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.**