

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

Learning Forum preparation and implementation	Project number/ cost centre: 20.2210.1-001.00
0. List of abbreviations	2
1. Context.....	3
1.1 Project description.....	3
1.2 Problem analysis.....	3
1.3 Project approach	3
2. Tasks to be performed by the contractor	4
2.1 Marketing and communication.....	4
2.2 Invitations and participant management	4
2.3 Travel logistics.....	5
2.4 Catering on the day of arrival.....	5
2.5 Venue setting	5
2.6 Conference gifts and materials	6
2.7 Online booking system for onsite support services	6
2.8 Post-event logistics	6
2.9 Milestones	6
4. Concept.....	7
Technical-methodological concept	7
Project management of the contractor (1.6)	8
5. Personnel concept.....	8
Team leader.....	8
Short-term expert pool with minimum 3, maximum 6 members	9
6. Costing requirements	9
Assignment of personnel and travel expenses	9
Sustainability aspects for travel	9
7. Inputs of GIZ or other actors.....	11
8. Requirements on the format of the tender	12
9. Data protection.....	12
10. Annexes.....	13

0. List of abbreviations

AG	Commissioning party
AN	Contractor
AuV	Auftragsverarbeitungsvereinbarung Outsourcing of data processing
AVB	General Terms and Conditions of Contract for supplying services and work
BMZ	Federal Ministry for Economic Cooperation and Development
CV	Curriculum Vitae
CO ₂	Carbon emissions
DSD	Department of Social Development
EU	European Union
FK	Expert
FKT	Expert days
GDPR	Regulation (EU) 2016/679 (General Data Protection Regulation)
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH
NGO	Non-Governmental Organisation
NYDA	National Youth Development Agency
NYS	National Youth Service
NYSU	National Youth Service Unit
PMO	Project Management Office
PYEI	Presidential Youth Employment Intervention
S2PYEI	Support to the Presidential Youth Employment Intervention
TOM	Technical and organisational measures
ToRs	Terms of reference

1. Context

1.1 Project description

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

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

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

1.2 Problem analysis

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

One component of the PYEI is the National Youth Service (NYS), which is led by the National Youth Development Agency (NYDA). The NYS funds NGOs able to provide a minimum 2,000 youth with community service opportunities in line with minimum wage standards for a period of six months with 16 hours per week. The community service is accompanied by training measures and aims to enhance the employability of the participants.

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

Due to the large scale of the NYS projects, a large number of NGOs are involved in its implementation: Most of the funding recipients are well-established NGOs, each of which works with dozens or even hundreds of smaller NGOs. The NGO Capacity Building Programme of the NYSU aimed to strengthen the pipeline of potential implementing partners by promoting youth-led NGOs from across the country.

After two years of successful implementation, the NYDA NYS Unit seeks to convene all NGOs and partners in October 2024 to reflect on the programme's impact.

1.3 Project approach

S2PYEI seeks to support the NYDA in hosting a Learning Forum for the Programme participants. This 3-day (4 nights) event is designed to collectively reflect on the programme's impact and provide the participants with skills they need to contribute to the NYS. The event aims to highlight the success stories, create a platform for participants to network, and facilitate the exchange of valuable support services. The Learning Forum shall take place in person in Gauteng from 30 September to 04 October 2024. The exact location will be communicated by the start of the contract, with preference being the OR Tambo airport region. On Day 1 of the

conference, which is 01 October, participants will engage in site visits to Cystal Park and Daveyton from 8:00 to 16:30, visiting nearby NGOs to observe their NYS community initiatives. Days 2 and 3, i.e. 02 October and 03 October, will feature the formal programme, with all activities taking place at the event venue.

2. Tasks to be performed by the contractor

The contractor is responsible for providing the following services:

2.1 Marketing and communication

The contractor shall provide the following:

- A photo booth at the event, including hashtags for participants to use when posting their own photos on social media
- Designing and printing of lanyards and tags (180)

The contractor needs to submit the design of the photo booth and lanyards for approval by NYDA and GIZ before it can be printed and set up. The final photo booth needs to be set up on 01 October at the conference venue.

2.2 Invitations and participant management

The contractor ensures timely participant registration. This includes:

- Preparing and sending out invites to the contacts provided by GIZ
- Registering the participants and providing them with confirmation of their successful registration, collecting information on the following:
 - Name of the participants
 - Gender of the participant
 - If applicable: disability of the participant (this information is required to assess if particular measures need to be taken to enable the person to fully participate, for instance by providing sign language translation)
 - Special dietary restrictions
 - Name of the organisation
 - Any other information required to make the necessary logistic arrangements (see below)
- Reminding participants of the event 1 week in advance
- Designing and printing of lanyards and tags
- Welcoming and accrediting participants upon arrival at the event on 30 September 2024, including handing out name tags, the printed programme and, if sensible, floor plans
- Welcoming and accrediting partners and speakers upon arrival at the event on 02 October 2024, including handing out name tags, the printed programme and, if sensible, floor plans
- Assisting participants with special needs
- Ensuring clear, thoughtful, timely communication with all participants
- Responding to any participant queries in the preparation of and during the Learning Forum

2.3 Travel logistics

The contractor will make all required travel arrangements for the participants, incl. booking of flights, bus tickets, transport from the participants' place of departure and the airport of departure (if applicable) and transport between the airport and the venue. Travel itineraries must take into consideration economic, environmental and safety considerations. In particular, the following shall be considered:

- Itineraries shall be designed in a way that no participants have to depart on their journey before 07.00 on 30 September 2024, and that no participant arrives at the venue later than 19.00 on the same day.
- On the day of departure, no participant shall have to depart before 07.00, and no participant shall reach their destination after 20.00
- In the event that a participant options to travel by bus outside the hours specified above, an indemnity waiver must be signed.

The contractor is required to be present at the venue during the conference programme from 30 September to 04 October to support participants with their travel arrangements.

2.4 Catering on the day of arrival

Upon arrival, participants, partners and speakers will have staggered arrival times. For those reaching the hotel before 14:00, the contractor is responsible for arranging light lunches. The contractor must ensure that the lunches adhere to individual dietary requirements. Communication regarding the exact number of participants arriving before 14:00 will be coordinated between the contractor, NYDA, and GIZ.

2.5 Venue setting

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

- Where not provided by the venue, the contractor provides the following conferencing equipment:
 - a. 3 microphones
 - b. High quality sound speakers (2-3) sufficient to ensure good quality in the plenary room
 - c. Projector suitable for the size of the venue
 - d. Technology to enable virtual participation of individual speakers
 - e. Any cables or other utensils required for a functioning sound system.
- 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 available workstations, including charging ports for conference delegates
- Arrange participant seating and stage set-up for every session in the programme

The conferencing equipment needs to be hired for 2 days (02 October to 03 October 2024). The venue set up needs to be done the day before the conference, i.e. on 01 October 2024. Arrangement will be made by NYDA and GIZ with the venue for the contractor to set up the day before.

2.6 Conference gifts and materials

The contractor shall procure conference gifts for all participants and attendees to elevate the overall participant experience. The contractor shall procure the following items:

- 160 units of 10 000 mAh Power Bank
- 160 USB sticks with a storage volume of 32GB
- 160 Thermal coffee mugs

GIZ will provide the contractor with tote bags into which the gifts are to be placed by the contractor.

The contractor will be responsible for preparing and packaging conference packs for all confirmed attendees and making them available to GIZ on 30 September 2024 latest. The contractor would be responsible for delivering the gifts at the conference venue.

2.7 Online booking system for onsite support services

Throughout the formal programme (02 October to 03 October), participants will have access to partner support services to consult on various matters impacting their organisations including, taxation, governance and compliance, funding support, and proposal writing support. The contractor should develop an online booking system that participants can use to book a 30-minute slot before the conference for consultation during the conference. The system must be tested and approved by GIZ and NYDA four weeks before the event and it should be made accessible to participants two weeks prior to the scheduled event.

2.8 Post-event logistics

The contractor is responsible for dismantling the conference venue and transporting any material owned by GIZ or NYDA back to their respective offices.

2.9 Milestones

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

Milestones/process steps	Deadline
Kick-off meeting with GIZ and NYDA	June 2024
Invitation of participants	30 July 2024
Submission of final list of participants and final programme	30 August 2024
Learning Forum	30 September– 04 October 2024
Satisfaction survey	04-08 October 2024
Submission of survey results	11 October 2024

Period of assignment: from 01 June 2024 until 31 November 2024.

- The contractor is responsible for selecting, preparing, training and steering the short and long-term experts assigned to perform the tasks.
- The contractor provides equipment and supplies (consumables) and assumes the associated operating and administrative costs.

The contractor manages costs and expenditures, accounting processes and invoicing in line with the requirements of GIZ. The contractor reports regularly to GIZ in accordance with the current AVB of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH.

3. Eligibility criteria

The bidder should fulfil following minimum eligibility criteria:

3.1 Commercial register entry

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

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

3.4 The bidder must also provide examples of two (2) projects (conference and event management) with a minimum commission value of R 800,000 in the past 3 years through a brief description of the project, the dates and who the services were provided for.

4. Concept

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

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

Technical-methodological concept

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

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

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

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

Project management of the contractor (1.6)

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

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

5. Personnel concept

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

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

Team leader

Tasks of the team leader

- Overall responsibility for the 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 (Bachelor/equivalent) in Event Management, Communication, Social Sciences or another relevant degree.
- Language (2.1.2): C1-level language proficiency in English
- General professional experience (2.1.3): 10 years of professional experience in the event management sector
- Specific professional experience (2.1.4): 3 reference projects in conference management with more than 150 participants (**in the CV specify: event title, location, dates, client, target group**) for each project.
- 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 South Africa
- Development cooperation (DC) experience (2.1.7): None
- Other (2.1.8): None

Short-term expert pool with minimum 3, 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

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

Qualifications of the short-term expert pool

- Education/training (2.6.1): All experts with university qualification (Bachelor) in Event Management, Communication, Social Sciences or another relevant degree
- Language (2.6.2): All experts with C1-level language proficiency in English
- General professional experience (2.6.3): All experts with 2 years of professional experience in the relevant field
- Specific professional experience (2.6.4): 1 expert with 2 years of professional experience in travel logistics; 2 experts with 2 reference projects supporting the organisation of events of a similar size (at least 100 participants)
- Regional experience (2.6.5): All experts with 2 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

Assignment of personnel and travel expenses

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	25	25	
Designation of short-term expert pool	4	20	80	
Travel expenses	Quantity	Number per expert	Total	Comments
Per-diem allowance in country of assignment	15			Please calculate the per diem in the event the experts need to travel to Johannesburg to deliver on-site support from 30 September 2024 to 04 October 2024. Paid against evidence.
Overnight allowance in country of assignment	15			Please calculate the overnight allowance in the event the experts need to travel to Johannesburg to deliver on-site support from 30 September 2024 to 04 October 2024. Paid against evidence.
Transport	Quantity	Number per expert	Total	Comments
Domestic flights	3			Please calculate a budget for return flights if experts need to travel to Johannesburg by plane to deliver on-site services. Paid against evidence.
CO ₂ compensation for air travel	3			Please budget carbon offsets at R300 per return flight for the experts that need to travel to Johannesburg by plane. Paid against evidence.
Fixed travel budget	1		R900, 000	A R900,000 budget is earmarked for travel within country of assignment for participants and speakers incl. 100 return flights, CO ₂ compensation for air travel at R300 per return flight, transfer to/from the airport, 100 bus

Other costs	Number	Price	Total	Comments
				tickets etc. The costs will be reimbursed against evidence.
Flexible remuneration	1	R40, 000	R40, 000	A budget of ZAR 40, 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.
Fixed cost - Procurement of materials and equipment	1		R198, 000	Please include this fixed budget for the following costs: <ul style="list-style-type: none"> • Power banks (160) • USBs (160) • Lanyards and tags (180) • Thermal coffee mugs (160) • Photobooth All to be paid against evidence
Participant: invitation management system	1			Please calculate a budget for this item. Paid against evidence.
Booking system for on-site services	1			Please calculate a budget for this item. Paid against evidence.
Arrival snack for participants	60	R100	R6,000	Paid against evidence.
Travel expenses for the experts (train, car, airport transfers)	6			Travel within the country of assignment, transfer to/from airport etc. Please calculate a budget for this item if required. Paid against evidence.
Travel kilometres	500	R4.84	R2, 420	In the case the experts need to travel to render the service and use their company car. Paid against evidence. Km's are reimbursed at R4.84 per kilometre.

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

7. Inputs of GIZ or other actors

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

- Sending out a save-the-date to the invitees two months before the event to ensure availability and swift registration once the invites have been sent out by the contractor
- Making available to the contractor the list of persons to whom the invitation is to be extended, including email addresses
- Booking of the conferencing venue, including water and stationery (anticipated by mid-June 2024). The venue will be available the day before the conference (i.e. on 30 September 2024) so that the contractor can register the participants, set up the photo booth and ensure the correct set-up of the plenary
- Booking of the accommodation for participants and any other persons involved in the event like the facilitator (except the contractor)
- Catering for all meals throughout the event (breakfast, lunch, dinner, one coffee break in the later morning and one in the afternoon) for participants, speakers, organisers and facilitators (incl. the contractor)
- Transport to and from the venue for any persons involved in the event that are not participants (except the contractor)
- Procure and handle all marketing and communications materials incl. roll-up banners, stage backdrop banner, programme, videography and photography, social media posts etc.
- Transport of participants for site visits on 01 October
- Communication material for the participants (tote bags, A4 presentation folder, notepad, pens) and for the venue (roll-up banners, stage backdrop)

8. Requirements on the format of the tender

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

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

The CVs of the personnel proposed in accordance with Chapter 5 of the ToRs must be submitted using the format specified in the terms and conditions for application. The CVs shall not exceed 4 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. Data protection

Participant's personal data will be processed by the contractor on behalf of GIZ when carrying out the "tasks" Chapter 2. Therefore, an agreement on "Outsourcing of data processing (AuV)" Annex 3 will be concluded with the contractor in accordance with Art. 28 GDPR. For this purpose, during the tendering process, the contractor must fill in the technical and organisational measures (TOM) of data processing within the AuV, for compliance with the

data protection requirements, contractor must outline how they will comply with the data protection laws. 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. Where the contractor is processing personal data not as an outsourced processor, he has to independently ensure data protection compliance.

When developing data processing systems on behalf of the GIZ, the contractor must comply with the provisions of the GDPR and some local laws (which must be verified, especially in non-EU countries) regulating such systems, as they (the systems) are meant for the processing of personal data. In this regard, compliance with the requirements of data protection by design and by default becomes imperative, when creating Apps, software, websites, monitoring cameras, and any other tool that is used to process personal data.

At the centre of such considerations for privacy by design and by default are data protection principles and the rights of the data subjects. The most relevant data protection principles here are: lawfulness, transparency, data minimization, storage limitation, accuracy, and most especially, integrity and confidentiality. The principle of integrity and confidentiality, for instance, demands the application of privacy enhancing technologies, such as access control (through strong passwords), authentication, encryption, pseudonymization etc., to protect against data breaches. The practical implication of these principles is well elaborated in Annex 2. ("The Development of a Data Processing System under the GDPR").

Parallel to the above-mentioned principles are the numerous rights accorded to the data subject, which cannot be given less weight. As a matter of fact, the GDPR requires the controller to facilitate the exercise of the data subject's rights. The system must foresee and provide the possibility for the exercise of the following rights: the rights to rectification; erasure; and data portability; the right to withdraw consent; rights to restrict or object to processing (with these last two requiring the temporal deactivation of the profile without deleting his personal data). See Annex 2.

The technology used to ensure compliance with these provisions must reflect the state of art and must be enough to mitigate any threat to the rights and freedoms of the data subject, such as losing control over his personal data. It shall be tested periodically reviewed and updated.

10. Annexes

- Annex 1. Minimum standards for sustainable event management at GIZ
- Annex 2. The development of a data processing system under the GDPR
- Annex 3. Outsourcing of data processing (AuV)