

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

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<b>Service provider for graphic design and video editing assignments for ATAF from November 2023 to July 2024</b>	<b>Project number/ cost centre: 17.2088.7-001.00</b>
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**0. List of abbreviations**

ATAF	African Tax Administration Forum
BMZ	German Ministry for Economic Cooperation and Development
ToR	Terms of Reference

## 1. Context

The “Good Financial Governance in Africa II [GFG] Programme”, implemented by the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH on behalf of the German Ministry for Economic Cooperation and Development [BMZ], promotes transparency, accountability and domestic resource mobilisation in Africa. Seeking to improve good financial governance in the action fields tax policy and administration, budget reform, external audit and legislative oversight, the programme works with four regional public finance networks that offer country-specific and technical advice for their members: The African Tax Administration Forum [ATAF], the Collaborative Africa Budget Reform Initiative [CABRI], the African Organisation of Public Accounts Committees [AFROPAC] and the African Organisation of Supreme Audit Institutions [AFROSAI]. As an additional cross-cutting element, the programme supports efforts to strengthen an African voice in global debates on topics of good financial governance.

In the area of tax policy and tax administration, the **African Tax Administration Forum [ATAF]** is the key partner of the GFG in Africa programme. Founded in 2009 as an association of currently 40 African tax administrations, ATAF strives to provide a platform to improve the performance of tax administration in Africa, driven by the firm conviction that better tax administrations will enhance economic growth, increase accountability of the states to their citizens and mobilise domestic resources more effectively.

The ATAF is an African organisation that aims to improve tax systems in Africa through exchanges, knowledge dissemination, capacity development and active contribution to the regional and global tax agenda. It provides a platform for promoting and facilitating cooperation among African Tax Administrations and other relevant and interested stakeholders with the aim of improving the efficacy of their tax policy, legislation and administration.

Since its inception, ATAF has embarked on a series of comprehensive initiatives for its member states and beyond, with the aim to develop a sustainable skill base of tax administrators across the continent and to strengthen approaches, policies and work methods of administrators and tax practitioners on the continent. Consistent improvement in capacity will ensure that African revenue authorities become more efficient and effective in the mobilisation of domestic resources and hence contributing significantly to state building and promoting transparent and accountable governance.

The organisation promotes cooperation, knowledge sharing and capacity building among African tax administrations.

As part of the services offered to its members, ATAF produces numerous marketing collaterals and publications aimed strengthening the organisation's brand and furthering its visibility amongst target audiences. In addition, logos, promotional or branding paraphernalia, and other marketing supports (e.g. videos, podcasts etc) are critical to promote ATAF's events and increase the visibility of the organisation.

To ensure timely and efficient response to its needs for the design and development of marketing support materials, ATAF seeks to hire the services of an experienced Graphic designer and video editing company (the "service provider").

## **2. Tasks to be performed by the contractor**

The service provider will work under the direction of the Head Corporate Services and the supervision of ATAF's Media and Communications team. The scope of work will concentrate on ATAF's marketing collaterals and publications for all ATAF's work within each of its units.

The service provider is responsible for providing the following services in line with ATAF's Communication policy and Corporate Identity Guidelines:

- Design, layout and printing [ when required] of
  - publications, reports and products
  - Media for digital platforms
  - Advertisements for both digital and print media
  - Marketing material such as banners, posters, booklets, leaflets, books, calendars, bulletins, flyers, cards etc;
  - Any other material which may be required to effectively communicate ATAF/GIZ activities and items;
- Ensure implementation and consistency of design graphic guidelines in all ATAF branding and marketing products;
- Deliver creative and innovative ideas for print, electronic, web-based and animated marketing and branding materials.
- Improve and edit artwork, photos, charts and other graphic elements;
- Create animations for illustrative purposes such as animations, presentations and more advanced solutions (design of packaging, graphic digitalization);
- Edit and produce videos, GIFs and other multimedia marketing material for use on social media, web and other platforms
- Custom photo editing (restoration, noise reduction, tonal adjustment)

- Deliver or facilitate the delivery of creative graphic and technical solutions for use of new media
- Design and produce marketing and branding paraphernalia, and corporate gifts as required by the Secretariat

Expected outputs from the service provider include certain milestones, as laid out in the table below and are to be achieved by certain dates during the contract term:

	<b>Tasks/Activities/Deliverables</b>	<b>Estimated working days</b>	<b>Proposed (tentative) time period to start/deliver activities</b>
	Inception meetings and briefings with Media and Communication Manager and Team.	0,5	1 November 2023
	<p><b>ATAF Annual Report</b></p> <p>Tasks include Designing infographics, social media banners, web banners and producing 4 short promo videos (2 min each) to present the highlights of the 2020 Annual report</p>	10	2 November 2023 - 15 July 2024
	<p><b>Finalisation of ATAF's admin templates</b></p> <p>Tasks include reviewing ATAF's corporate identity in line with the New Decade Project and designing admin templates (letterheads, PPTs, etc. ) to be used by the Secretariat.</p>	12	2 November 2023 - 15 July 2024
	<ul style="list-style-type: none"> <li>• <b>ATAF Train-the-trainer</b></li> <li>• <b>Technical workshop on DMTT</b></li> <li>• <b>Joint webinar with TARC or tax administration</b></li> <li>• <b>Tax research Methods</b></li> <li>• <b>AWITN Mentorship launch</b></li> <li>• <b>Revenue Forecasting Workshop</b></li> <li>• <b>1 x technical assistance offerings brochure</b></li> <li>• <b>1 short video showcasing the technical assistance work (marketing video for technical assistance)</b></li> </ul> <p>Tasks include Designing infographics, social media banners, web banners and producing 4 short promo videos (2 min each)</p>	20	2 November 2023 - 15 July 2024

	<ul style="list-style-type: none"> <li>• <b>Intermediate VAT Course</b></li> <li>• <b>ATAF Governance Committees Meetings</b></li> <li>• <b>Research Webinar</b></li> <li>• <b>Commissioner Generals Masterclass</b></li> <li>• <b>ATO Launch</b></li> <li>• <b>Donors Conference</b></li> </ul> <p>Tasks include Designing infographics, social media banners, web banners and producing 4 short promo videos (2 min each)</p>	23	2 November 2023 - 15 July 2024
	<p><b>Production of ATAF's corporate videos</b></p> <ul style="list-style-type: none"> <li>• <b>Tax Programmes</b></li> <li>• <b>Research</b></li> <li>• <b>Training</b></li> <li>• <b>Technical Committees</b></li> <li>• <b>General corporate video</b></li> </ul>	17	To be delivered by 30 November 2023
	<ul style="list-style-type: none"> <li>• <b>7th ATAF High-Level Tax Policy Dialogue</b></li> <li>• <b>Tax audit course</b></li> <li>• <b>EOI Workshop</b></li> <li>• <b>ATMeN Launch</b></li> <li>• <b>Transfer Pricing Course</b></li> <li>• <b>Country programmes &amp; technical assistance Programmes</b></li> </ul> <p>Tasks include Designing infographics, social media banners, web banners and producing 4 short promo videos (2 min each)</p>	25	2 November 2023 - 15 July 2024
	<ul style="list-style-type: none"> <li>• <b>VAT Meeting</b></li> <li>• <b>Workshop on Pillar 1</b></li> <li>• <b>UN Tax Committee of experts</b></li> <li>• <b>2<sup>nd</sup> Research Webinar on Contemporary Research Priorities</b></li> <li>• <b>1 x technical assistance mission video</b></li> </ul> <p>Tasks include Designing infographics, social media banners, web banners and producing 2 short promo videos (2 min each)</p>	17	2 November 2023 - 15 July 2024
	<p><b>ATAF Annual Meetings</b></p> <p>Tasks include: Designing infographics, social media banners, web banners and producing 2</p>	7	25-29 November 2023 (TBC)

	short promo videos (2 min each) to promote the event		
	<b>8<sup>th</sup> ATRN Congress</b>  Tasks include: Designing infographics, social media banners, web banners and producing 2 short promo videos (2 min each) to promote the event	7	2 November 2023 - 15 July 2024
	<b>2<sup>nd</sup> ATAF CCC</b>  Tasks include: Designing infographics, social media banners, web banners and producing 2 short promo videos (2 min each) to promote the event	8	2 November 2023 - 15 July 2024
	<b>Marketing of various ATAF products</b>  Task incl.: Printing packages (all layout and design files, including pre-press for the printing house and web-versions) for publications and other communication products, such as reports, brochures, handbooks, leaflets, charts, photographs, posters, folders, etc.;	25	2 November 2023 - 15 July 2024
	<b>International Conference on Tax in Africa and ATAF's General Assembly</b>  Tasks incl.: Artwork editing of photos and other graphic elements, creating visually compelling graphics and motion graphic content for use on ATAF's social media platforms, such as Instagram, Twitter, Facebook, LinkedIn and YouTube, and other digital properties, in support of ATAF's communications goals.	15	5 November 2023 – 5 December 2023
	A final report / portfolio detailing and compiling all the work undertaken for ATAF.	3	20-25 July 2024
	Final meeting with Manager – TA and Director of Tax Programmes.	0,5	28 July 2024

GIZ shall hire the contractor for up to **190 working days** that will be completed **from November 1<sup>st</sup>, 2023, to July 29<sup>th</sup>, 2024.**

In order to complete the assignment as per the breakdown of deliverables, it is expected that the service provider will allocate working days in agreement with ATAF's Communication and Media team. Tasks, where possible, should be done concurrently/ or in parallel in coordination with Media and Communications team members.

All information pertaining to this assignment (Magazine content, designs, logos, audio, digital, cyber, project documents, etc), which the service provider may come into contact with and/or develop in the performance of his/her, duties under this consultancy shall remain the property of ATAF, who shall have exclusive rights over their use. Except for purposes of this assignment, the information shall not be disclosed to the public nor used in whatever form without written permission from ATAF.

Contingent to the lifting of lockdown and resuming of normal office hours, the service provider will be required to perform the assignment's activity described above remotely. It is therefore expected that the service provider would be familiar and be comfortable communicating/meeting with all stakeholders on virtual platforms such as Zoom, MS Teams, etc.

The service provider will work under the supervision of Mr. Eugene Southgate, Head of Corporate Services and is expected to perform all tasks listed above.

Your contact person at ATAF:

- Ms. Refilwe Pitjeng, Media and Communications Officer, ATAF ([rpitieng@ataftax.org](mailto:rpitieng@ataftax.org))
- Mr. Eugene Southgate, Corporate Services Director, ATAF ([esouthgate@ataftax.org](mailto:esouthgate@ataftax.org))

Your contact person at GIZ:

- Mr. Tatu Ilunga, Technical Advisor, GIZ ([tatu.ilunga@giz.de](mailto:tatu.ilunga@giz.de))

All deliverables documents will be submitted to ATAF and GIZ:

- Mr. Eugene Southgate, Corporate Services Director, ATAF ([esouthgate@ataftax.org](mailto:esouthgate@ataftax.org))
- Mr. Tatu Ilunga, Technical Advisor, GIZ ([tatu.ilunga@giz.de](mailto:tatu.ilunga@giz.de)) – one copy of each final documents.

### **3. Concept**

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 2). 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). This will be provided in a concept note of a maximum of five pages, including techniques and tools to be used.

In addition, the bidder shall provide personnel assignment plan (who, when, what work steps) incl. explanation and specification of expert months.

A design portfolio with five successfully completed projects of basic design principles including typography, line, form, colour, pattern, contrast scale, weight; creative data visualization capacity, multiple language designs, multiple audience designs and/or advocacy/campaign designs will be also required.

If one of the maximum page lengths from the concept note is exceeded, the content appearing after the cut-off point will not be included in the assessment.

#### **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, ATAF, partners and others involved in the projects
- 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 (2.1.1): University qualification in Digital Media or Graduate degree in a relevant discipline (Journalism, Mass Communication or Marketing, Arts, or similar).
- Language (2.1.2): Good business language skills in English. Knowledge of French or/and Portuguese will be an advantage.

- Professional experience:
  - General professional experience (2.1.3): 10 years of professional experience of theoretical and practical experience in graphic design and editing for large projects with a wide network of marketing & print communications companies
  - Specific professional experience (2.1.4): 10 years in (1) graphic design, including the use of design software such as the Adobe suite pieces of software; (2) in video editing with a solid knowledge of key video editing software; and (3) printing processes (offset and digital) and color management; in a multicultural international environment
- Leadership/management experience (2.1.5): 6 years of management/leadership experience as project team leader or manager in a company.

### **Short-term expert pool with minimum 1, maximum 2 members**

#### Tasks of the short-term expert pool

- Prepare the design concept of the ATAF publications
- Submit a slight distinction between the main report with all accompanying papers
- Layout all ATAF reports in English, French and Portuguese
- Prepare and propose all infographics to the related chapters

#### Qualifications of the short-term expert pool

- Education (2.6.1): 1 or 2 experts with university qualification in Digital Media or Graduate degree in a relevant discipline (Journalism, Mass Communication or Marketing, Arts, or similar).
- Language (2.6.2): 1 or 2 experts with very good business language skills in English. Knowledge of French or/and Portuguese will be an advantage
- Professional experience:
  - General professional experience (2.6.3): 1 or 2 experts with 3 years of experience of theoretical and practical experience in graphic design and editing for large projects with a wide network of marketing & print communications companies.
  - Specific professional experience (2.6.4): 1 or 2 experts with 3 years of experience in (1) graphic design, including the use of design software such as the Adobe suite pieces of software; (2) in video editing with a solid knowledge of key video editing software; and (3) printing processes (offset and digital) and color management; in a multicultural international environment.

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

It is expected that this assignment will be undertaken by a company equipped with the needed design software such as Photoshop, Illustrator, InDesign, Premiere Pro, WordPress; video editing software such as Final Cut Pro and Premiere Pro; as well as standard software packages, including MS Office– MS Access–MS Visio – Adobe Acrobat, in order to successfully perform this assignment. The service provider should list all design software in his/her possession for this assignment.

## **5. Costing requirements**

### **Assignment of personnel**

The assignment for the service provider shall comprise a **total of up to 380 working days** (for breakdown of working days per deliverables, please look at the Chapter 2).

Team leader:

Short-term expert pool:

The bidder is required to calculate the costs of Team leader and Short-term experts separately (daily fee multiple with number of working days).

In order to complete the assignment as per the breakdown of deliverables, it is expected that the service provider will allocate working days in agreement with ATAF's Communication and Media team.

### **Travel and location**

The service provider will work from South Africa. Therefore, no traveling is foreseen to take place for this assignment. The service provider could be expected to work or have meetings from ATAF offices, in Hatfield, Pretoria, during the assignment in compliance with ATAF and national COVID protocols.

### **Other costs**

- No other costs applicable

Specification of inputs

<b>Fee days</b>	<b>Number of experts</b>	<b>Number of days per expert</b>	<b>Total</b>	<b>Comments</b>
Team Leader	1	190	190	
Key expert	1	190	190	
<b>Travel expenses</b>	<b>Quantity of trips (Round Trip)</b>	<b>KM (Round Trip)</b>	<b>Total (Round Trip)</b>	<b>Comments</b>
Travel expenses (train, car) • Meeting at ATAF Offices	5	120	600 KM	Travel (Round Trip) by car within the country of assignment (with Gauteng Province) to ATAF offices.
<b>Other costs</b>	<b>Number of experts</b>	<b>Number of days per expert</b>	<b>Total</b>	<b>Comments</b>
Flexible remuneration	1	8	8	A budget item for flexible remuneration is foreseen in case additional work for up to 8 days is needed. 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

No equipment is to be purchased on behalf of ATAF as part of this service contract. The service provider is expected to use its respective equipment (i.e.; laptops and telecommunication facilities) to complete the assignment with all the necessary software installed. It is expected that the service provider will have a good internet connectivity and ensure close collaboration with ATAF and other partners, as required.

## 7. Requirements on the format of the bid

The structure of the bid must correspond to the structure of the ToR. It must be legible (font size 11 or larger) and clearly formulated. The bid is drawn up in English.

The CV of the service provider must be submitted using the format specified in the terms and conditions for application in accordance with Chapters 2, 3 and 4 of the ToR. The CVs of the service provider shall not exceed 3 pages.

**Please calculate your price bid based exactly on the aforementioned costing requirements (Chapter 5: Assignment of personnel, Travel and Other costs).** In the contract, the service provider has no claim to fully exhaust the working days/budgets. The number of working days and the budget amount shall be agreed in the contract as ‘up to’ amounts. The specifications for pricing are defined in the price schedule.

The evaluation criteria and points for the bid will be allocated for each of the criteria in accordance with the following Table:

No	Description of evaluation criteria	Maximum points (weighting in %)
<b>Assessment of technical-methodological design</b>		
1	Interpretation of the objectives in the ToRs, critical examination of tasks (1.1.1).	8
2	Description and justification of the contractor's strategy for delivering the services put out to tender (1.1.2).	20
3	Personnel assignment plan (who, when, what work steps) incl. explanation and specification of expert months (1.6.2).	2
<b>Assessment of proposed staff – Expert 1 (Team Leader)</b>		
1	Education (2.1.1): University qualification in Digital Media or Graduate degree in a relevant discipline (Journalism, Mass Communication or Marketing, Arts, or similar).	4
2	Language (2.1.2): Good business language skills in English. Knowledge of French or/and Portuguese will be an advantage.	4
3.	General professional experience (2.1.3): 10 years of professional experience of theoretical and practical experience in graphic design and editing for large projects with a wide network of marketing & print communications companies.	10
4.	Specific professional experience (2.1.4): 10 years in (1) graphic design, including the use of design software such as the Adobe suite pieces of software; (2) in video editing with a solid knowledge of key video editing software; and (3) printing processes (offset and digital)	13

	and color management; in a multicultural international environment.	
5	Leadership/management experience (2.1.5): 6 years of management/leadership experience as project team leader or manager in a company.	7
<b>Assessment of proposed staff – Short-term expert pool</b>		
1	Education (2.6.1): 1 or 2 experts with university qualification in Digital Media or Graduate degree in a relevant discipline (Journalism, Mass Communication or Marketing, Arts, or similar).	4
2	Language (2.6.2): 1 or 2 experts with very good business language skills in English. Knowledge of French or/and Portuguese will be an advantage.	4
3	General professional experience (2.6.3): 1 or 2 experts with 3 years of experience of theoretical and practical experience in graphic design and editing for large projects with a wide network of marketing & print communications companies.	10
4	Specific professional experience (2.6.4): 1 or 2 experts with 3 years of experience in (1) graphic design, including the use of design software such as the Adobe suite pieces of software; (2) in video editing with a solid knowledge of key video editing software; and (3) printing processes (offset and digital) and color management; in a multicultural international environment.	14

## 8. Other Requirements

- Please submit your proposal (technical and price proposal) in separate files/folder to [ZA\\_Quotation@giz.de](mailto:ZA_Quotation@giz.de) no later than **18<sup>th</sup> August 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.**

