

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

Service provider for RSI and Interpretation Equipment for ATAF's event running from November 2023 to June 2024	Project number/ cost centre: 17.2088.7-001.00
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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.

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 good, transparent, and accountable governance.

The organisation promotes cooperation, knowledge sharing and capacity building among African tax administrations through a variety of training and other events and through dissemination of key publications and technical assistance initiatives.

2. Tasks to be performed by the contractor

The purpose of this bid is to procure:

- Remote simultaneous interpretation (RSI) services for ATAF’s training courses/ events;
- Possible simultaneous interpretation services and all relevant interpretation and sound equipment and booths etc., should the event in question be organised physically in South Africa.
- Translation services

The services will be procured over the course of a defined period and through a qualified pool of **English<> French interpreters and English<> Portuguese interpreters**. A team of either **4 interpreters (2 per language combination FR/ENG/FR and 2 per language combination PT/ENG/PT)** or **6 interpreters (3 per language combination FR/ENG/FR and 3 per language combination PT/ENG/PT)** will be required, depending on the nature of the subject matter of the event. The events in question are listed below and will take place virtually on Zoom, or physically in either Johannesburg or Pretoria.

Events requiring interpretation and/or translation services

	Name of event	Expected dates of event	No. of days	Duration of event per day	interpretation services needed	Total number of interpreters
1	IT tax administration system for Africa Workshop	November 2023 [Dates to be confirmed]	2	8 hours (Physical event)	(i) 2 English<> French interpreters; (ii) 2 English<> Portuguese interpreters	4 interpreters
2	Joint webinar on a thematic area	November 2023 [Dates to be confirmed]	2	4 hours (virtual event)	(i) 2 English<> French interpreters; (ii) 2 English<> Portuguese interpreters	4 interpreters
3	TA Mission Benin	(Nov/Dec) 2023 [Dates to be confirmed]	5	4 hours (virtual event)	2 English<> French interpreters	2 interpreters
4	TA Mission DRC	(Nov/Dec) 2023 [Dates to be confirmed]	5	4 hours (virtual event)	i) 2 English<> French interpreters;	2 interpreters
5	TA Mission Mauritania	(Nov/Dec) 2023 [Dates to be confirmed]	5	4 hours (virtual event)	(i) 2 English<> French interpreters	2 interpreters
6	TA Mission Niger	(Nov./Dec.) 2023 [Dates to be confirmed]	5	4 hours (virtual event)	(i) 2 English<> French interpreters	2 interpreters
7	TA Mission Burkina Faso	(Nov./Dec.) 2023 [Dates to be confirmed]	5	4 hours (virtual event)	(i) 2 English<> French interpreters	2 interpreters
8	TA Mission Mozambique	(Nov./Dec.) 2023 [Dates to be confirmed]	5	4 hours	(i) 2 English<> Portuguese interpreters	2 interpreters

				(virtual event)		
9	Technical committee meeting	(Nov./Dec.) 2023 [Dates to be confirmed]	3	4 hours (virtual event)	(i) 3 English<> French interpreters; (ii) 3 English<> Portuguese interpreters	6 interpreters
10	CBT Meeting	Nov. 2023 [Dates to be confirmed]	1	4 hours (virtual event)	(i) 3 English<> French interpreters;	3 interpreters
11	EOI Meeting	Nov. 2023 [Dates to be confirmed]	1	4 hours (virtual event)	(i) 2 English<> French interpreters;	2 interpreters
12	JTC Meeting	Nov. 2023 [Dates to be confirmed]	2	4 hours (virtual event)	(i) 3 English<> French interpreters (ii) 3 English<> Portuguese interpreters	6 interpreters
13	DTWG Meeting	Nov. 2023 [Dates to be confirmed]	2	4 hours (virtual event)	(i) 3 English<> French interpreters; (ii) 3 English<> Portuguese interpreters	6 interpreters
14	Country Correspondents working meeting	28 Nov. 2023 [Dates to be confirmed]	2	4 hours (virtual event)	(i) 2 English<> French interpreters; (ii) 2 English<> Portuguese interpreters	4 interpreters
15	UN tax committee meetings	10 Nov. 2023 [Dates to be confirmed]	1	4 hours (virtual event)	(i) 2 English<> French interpreters; (ii) 2 English<> Portuguese interpreters	4 interpreters
16	Crypto currency policy brief workshop	26 Nov. 2023 [Dates to be confirmed]	1	4 hours (virtual event)	(i) 2 English<> French interpreters; (ii) 2 English<> Portuguese interpreters	4 interpreters
17	IT tax administration system for Africa Workshop	22 Nov. 2023 [Dates to be confirmed]	1	4 hours (virtual event)	(i) 2 English<> French interpreters; (ii) 2 English<> Portuguese interpreters	4 interpreters
18	ATAF EVENT 1	Dec. 2023 – June 2024 [Dates to be confirmed]	2	4 hours (virtual event)	(i) 3 English<> French interpreters; (ii) 3 English<> Portuguese interpreters	6 interpreters

19	ATAF EVENT 2	Dec. 2023 – June 2024 [Dates to be confirmed]	3	8 hours (Physical event)	(i) 2 English<> French interpreters; (ii) 2 English<> Portuguese interpreters	4 interpreters
20	ATAF EVENT 3	Feb. – June 2024 [Dates to be confirmed]	3	8 hours Physical event	(i) 2 English<> French interpreters; (ii) 2 English<> Portuguese interpreters	4 interpreters
21	ATAF EVENT 4	Feb. June 2024 [Dates to be confirmed]	3	8 hours (Physical event)	(i) 3 English<> French interpreters; (ii) 3 English<> Portuguese interpreters	4 interpreters
Possible translation of documents into FRENCH and/ or PORTUGUESE : about 30 000 – 40 000 words						

Important details and clarifications linked to the events:

- The language of delivery for most of these events will be English, but there will be opportunity for participants to intervene. It is therefore imperative that the interpreters **interpret ably and effectively into French/Portuguese, but also into English when required.**
- For virtual events:
 - ATAF will provide the Professional Zoom licence and host the meeting.
 - The Service Provider will be expected to run the necessary sound and relay checks at least 30-40 minutes before the start of the event and to be on standby should technical assistance be required.
 - The Service Provider will not be required to remain “host” of the event for the duration of the event. Once the meeting has commenced, the “host” will be reclaimed by the ATAF technical team, who will be on standby during the event, should an interpreter need to be given the interpretation function again.
 - All interpreters need to be ready and available to connect at least 30 minutes before the event

2.2 Physical event requirements, should one or more of the events above take place in a physical location in South Africa:

Item
Interpretation booths (completely soundproof, enclosed and ISO compliant)
Chairs for interpreters and work shelf/desk inside of booth
Interpretation system (Transmitter, CCU, Radiators)
Consoles for interpreters
Headphones for interpreters
Microphones for participants
Receivers for participants
Roving mics
Chairman microphone
PA system (mixers, speakers)
Onsite technician
Set-up / strike
Transportation of equipment
Recording of the event (full English recording)

3. Deliverables and time frame

These assignments are **home-based** (interpreters will work from home), unless the event is physical, in which case the interpreters will work on-site, and is foreseen to take of up to a **total of 59 days** to perform the required interpretation services, and includes the following deliverables:

Deliverables	Estimated workdays	Dates
Interpretation services for one physical event.	2	November 2023 [Dates to be confirmed]
Remote simultaneous interpretation (RSI) services for one event on a virtual platform.	2	November 2023 [Dates to be confirmed]
Remote simultaneous interpretation (RSI) services for one event on a virtual platform.	5	(Nov./Dec.) 2023 [Dates to be confirmed]
Remote simultaneous interpretation (RSI) services for one event on a virtual platform.	5	(Nov./Dec.) 2023 [Dates to be confirmed]
Remote simultaneous interpretation (RSI) services for one event on a virtual platform.	5	(Nov./Dec.) 2023 [Dates to be confirmed]
Remote simultaneous interpretation (RSI) services for one event on a virtual platform.	5	(Nov./Dec.) 2023 [Dates to be confirmed]

Remote simultaneous interpretation (RSI) services for one event on a virtual platform.	5	(Nov./Dec.) 2023 [Dates to be confirmed]
Interpretation services for one physical event.	5	(Nov./Dec.) 2023 [Dates to be confirmed]
Remote simultaneous interpretation (RSI) services for one event on a virtual platform.	3	(Nov./Dec.) 2023 [Dates to be confirmed]]
Remote simultaneous interpretation (RSI) services for one event on a virtual platform.	1	7 Nov. 2023 [Dates to be confirmed]
Remote simultaneous interpretation (RSI) services for one event on a virtual platform.	1	7 Nov. 2023 [Dates to be confirmed]
Remote simultaneous interpretation (RSI) services for one event on a virtual platform.	2	7 Nov. 2023 [Dates to be confirmed]
Remote simultaneous interpretation (RSI) services for one event on a virtual platform.	2	7 Nov. 2023 [Dates to be confirmed]
Remote simultaneous interpretation (RSI) services for one event on a virtual platform.	2	28 Nov. 2023 [Dates to be confirmed]
Remote simultaneous interpretation (RSI) services for one event on a virtual platform.	1	10 Nov. 2023 [Dates to be confirmed]
Remote simultaneous interpretation (RSI) services for one event on a virtual platform.	1	26 Nov. 2023 [Dates to be confirmed]
Remote simultaneous interpretation (RSI) services for one event on a virtual platform.	1	22 Nov. 2023 [Dates to be confirmed]
Remote simultaneous interpretation (RSI) services for one event on a virtual platform. event.	2	Nov. 2023 – June 2024 [Dates to be confirmed]
Interpretation services for one physical event	3	Nov. 2023 – June 2024 [Dates to be confirmed]
Interpretation services for one physical event	3	Feb. – June 2024 [Dates to be confirmed]
Interpretation services for one physical event	3	Feb. – June 2024 [Dates to be confirmed]

The dates of a particular event will be confirmed at least one week before the event is scheduled to take place in order for the Service Provider to organise the necessary team of interpreters. Should an event date change, the Service Provider will be informed ahead of time.

Presentations/background information will be made available as early as possible so that the interpreters are able to adequately prepare for the meeting. Kindly note that Portuguese and/or French interpretation will only be needed dependant on confirmation of Lusophone/and or Francophone attendance of delegates. This will be confirmed at least **7 days** prior to the event in question.

The duration of the contract is foreseen to take seven (7) months, during which RSI services will be provided by the Service Provider for ATAF events taking place within the period of **1st November 2023 to 30th June 2024**.

The assignment will be paid according to the events which actually took place and for which services were rendered.

Any documents that the Service Provider and its team come into contact with during their work with ATAF shall be treated as confidential and cannot be share with any third party without prior concurrence from ATAF.

4. Personnel concept

It is expected that the assignment will be undertaken by a Service Provider with regular and consistent access to **the same pool of suitable, highly qualified French<> English and Portuguese<>English simultaneous conference interpreters with RSI experience**.

The bidder is required to provide anonymised CVs of personnel who are suited to providing the services described (see Section 2). Should the CVs submitted meet the expected requirements, it is requested that the Service Provider make every effort to use interpreters whose CVs were submitted for the events. Should the interpreters whose CVs were submitted no longer be available for the event, the Service Provider should propose interpreters with similar quality for ATAF's review and agreement.

4.1 Short-term expert pool with minimum 6 (3 French <>English and 3 Portuguese<>English) interpreters

Tasks of the interpreters' pool

- French <>English simultaneous interpretation for the above-mentioned events
- Portuguese<>English simultaneous interpretation for the above-mentioned events

Qualifications of the interpreters' pool

- Education/training (2.6.1): A tertiary degree in interpretation/translation, linguistics or any other relevant field with French, English and /or Portuguese as the A-languages is preferable
- Language (2.6.2): Excellent command of the English and French or Portuguese languages regarding grammar, syntax and a professional spoken language style for interpreting terminology particularly linked to Taxation, Transfer Pricing and Tax Audit.
- General professional experience (2.6.3): A minimum of 3 years' experience in of technical terms related to Taxation, Transfer Pricing and Tax Audit,
- Specific professional experience (2.6.4): A minimum of 5 years of professional experience in interpreting (e.g.; with proper grammar, syntax and a professional spoken language style) from English<> French<> Portuguese incl. a track record of covering technical events for government entities, international organisations, non-profit/civil society organisations or other institutions of similar remit to ATAF
- Regional experience (2.6.5): A minimum of 1 year of professional experience for interpretation of terminology related to Public Financial Management and/or Taxation, covering regional or international conferences

In addition, the following will be required from the interpreters:

- Be comfortable and familiar with using technology and web-based applications;
- Being qualified as a member of AIIC / other similar associations would be an advantage;

- Have reliable internet connection and good quality headphones and microphone as well as a backup plan in case of electricity failures.
- Good communication skills
- Sociocultural competence
- Efficient, partner- and client-focused working methods
- Interdisciplinary thinking
- Ability to meet tight deadlines

The bidder must provide a clear overview of all proposed interpreters and their individual qualifications.

4.2 Short-term expert pool with a minimum 4 (2 French-English translators and 2 Portuguese-English) translators' team

Tasks of the short-term expert pool

- Translation of documents for the above-mentioned events/work areas into French
- Translation of documents for the above-mentioned events/work areas into Portuguese

Qualifications of the short-term expert pool

- Education/training (2.7.1): An advanced university degree in translation/interpretation, linguistics or any other relevant field with French, and/or Portuguese as the A-languages or professional translation certification with French, and/or Portuguese as the A-languages
- Language (2.7.2): Excellent command of the English and French or Portuguese languages regarding grammar, syntax and a professional written language style for translating terminology particularly linked to Tax and Finance-related fields
- General professional experience (2.7.3): A minimum of 5 years' experience in translation of material and technical terms related to Tax and Finance-related fields, especially Transfer Pricing and Tax Audit, incl. a track record of translation of technical documents for government entities, international organisations, non-profit/civil society organisations or other institutions of similar remit to ATAF
- Specific professional experience (2.7.4): A minimum of 5 years of professional experience in translating from English<> French<> Portuguese of technical documents

- Regional experience (2.7.5): A minimum of 1 year of professional experience for translation of terminology related to Tax and Finance-related fields covering regional or international conferences

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

As part of the bid, bidders should provide CVs for French and Portuguese translators labelled as follows (at least 2 CVs per language): Transl. Fr 1, Transl.; and Transl. Pt 1., Transl. Pt 2.

5. Costing requirements

Assignment of personnel

Short-term interpreters' pool: A team of either 4 interpreters (2 per language combination FR/ENG/FR and 2 per language combination PT/ENG/PT) or 6 interpreters (3 per language combination FR/ENG/FR and 3 per language combination PT/ENG/PT).

Short-term translators' pool: A team of a minimum 4 translators (2 per language combination FR/ENG/FR and 2 per language combination PT/ENG/PT).

Assignment of equipment

Relevant interpretation and sound equipment and booths etc., should the event in question be organised physically in South Africa (see Section 2.2.).

Travel and location

There are no travel nor location costs as part of this contract

Other costs

- No other costs applicable

Specification of inputs

Fee days	Number of experts	Total number of work/days	Comments
FR Interpreters - All ATAF Events	45	118	Please note that there is always a minimum of 2 interpreters per event and that the same group of interpreters would most likely cover multiple events
PT Interpreters - All ATAF Events	32	72	Please note that there is always a minimum of 2 interpreters per event and that the same group of interpreters would most likely cover multiple events
Translation costs	Total Number of words	Languages	Comments
French and Portuguese translation	40,000	French and Portuguese	
Interpretation equipment for 4 physical events	11		Interpretation equipment as per ToRs for 4 events that will take 11 days
Other costs			Comments
Flexible remuneration	1	8.000/ ZAR 161360	Flexible remuneration to cover unexpected or additional costs related to the provision of transport or equipment for events. Use of the flexible remuneration item requires prior written approval from GIZ.

6. Resources Provided

The service providers will be providing remote simultaneous interpretation services for events organised by ATAF. ATAF will ensure that the service provider receives the agenda, concept note, and all other necessary documentation linked to the event, at least a week before the event, so that the interpreters can adequately prepare for the event.

ATAF will host the events on its Zoom Pro account and will provide the Zoom interpretation link to the service provider a few days prior to the meeting. An ATAF representative will meet the Service provider and team on the platform each day prior to the start of the events in order to standby for the sound test and to activate interpretation for the event. ATAF will provide internal Zoom technical assistance for the duration of the event. It is expected that the interpreters will have good internet connectivity and good quality headsets/microphones.

To the best of their ability, ATAF and the partner organisation, where applicable, will convey the importance of stable internet connection for the facilitators/presenters, the importance of speaking slowly and clearly into their mics, and that all persons interacting on the platform be in a quiet environment conducive to the online nature of the event.

No equipment is to be purchased on behalf of ATAF as part of this service contract. The interpreters are expected to use their respective equipment (i.e.; laptops and telecommunication facilities) to complete the assignment with all the necessary software installed.

7. Requirements on the format of the bid

The structure of the bid must be consistent with 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 Service Provider is required to submit at least 5 anonymised CVs for French-English and 5 anonymised CVs for Portuguese-English interpreters. The CVs of all interpreters assigned for these events must include a list of academic qualifications, years of experience and conferences/ events covered as well as evidence of previous RSI experience as per Section 4 of the ToR. CVs must not exceed 4 pages and must be submitted using the format specified in the terms and conditions for application.

Please calculate your price bid based exactly on the aforementioned requirements under the scope of work (Section 2). In the contract the service has no claim to fully exhaust the days/workshops/ budgets. The number of days/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.

Additionally, please find the evaluation criteria and points allocated for each of the criteria in the following Table.

No	Description of evaluation criteria	Maximum points (Weighting in %)
Pool of Interpreters		
	Education/training (2.6.1): Experts with an advanced university degree in translation/interpretation, linguistics or any other relevant field with French, English and Portuguese as the A-languages or be certified professional simultaneous interpreters with a degree in interpretation with French, English and/or Portuguese as the A-languages	10
	Language (2.6.2): Excellent command of the English and French or Portuguese languages regarding grammar, syntax and a professional spoken language style for interpreting terminology particularly linked to Taxation and Finance.	15
	General professional experience (2.6.3): A minimum of 3 years' experience in interpreting technical terms related to Taxation, incl. a track record of interpreting event covering technical conversations for government entities, international organisations, non-profit/civil society organisations or other institutions of similar remit to ATAF	10
	Specific professional experience (2.6.4): A minimum of 5 years of professional experience in interpreting (e.g.; with proper grammar, syntax and a professional spoken language style) from English<> French<> Portuguese incl. a track record of covering tax technical events for government entities, international organisations, non-profit/civil society organisations or other institutions of similar remit to ATAF.	10

	Regional experience (2.6.5): A minimum of 1 year of professional experience for interpretation of terminology related to Taxation, covering regional or international conferences	5
Pool of Translators		
	Education/training (2.7.1): An advanced university degree in translation/interpretation, linguistics or any other relevant field with French, and/or Portuguese as the A-languages or professional translation certification with French, and/or Portuguese as the A-languages.	10
	Language (2.7.2): Excellent command of the English and French or Portuguese languages regarding grammar, syntax and a professional written language style for translating terminology particularly linked to Tax and Finance-related fields	15
	General professional experience (2.7.3): A minimum of 5 years' experience in translation of material and technical terms related to Tax and Finance-related fields, especially Transfer Pricing and Tax Audit, incl. a track record of translation of technical documents for government entities, international organisations, non-profit/civil society organisations or other institutions of similar remit to ATAF.	10
	Specific professional experience (2.7.4): A minimum of 5 years of professional experience in translating from English<> French<> Portuguese of technical documents.	10
	Regional experience (2.7.5): A minimum of 1 year of professional experience for translation of terminology related to Tax and Finance-related fields.	5

8. Other Requirements

- Please submit your proposal (technical and price proposal) in separate files/folder to ZA_Quotation@giz.de no later than 27th **October 2023** all documents must be in PDF, **quoting Reference Number: 83446970 in the Subject line.**
- **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.**