

## TERMS OF REFERENCE AND TECHNICAL SPECIFICATIONS

### I. General information

Assignment name	FRAMEWORK CONTRACT FOR LOGISTIC AND EVENT MANAGEMENT TO THE POST 2020 BIODIVERSITY FRAMEWORK – EU SUPPORT
Beneficiary	Expertise France
Country	Globally
Total estimated maximum amount	EUR 1 000 000

### II. Context and justification of the need

The project « Post-2020 Biodiversity Framework – EU Support », financed by the European Union and implemented in 10 partner countries<sup>1</sup> by Expertise France aims at informing the negotiations to finalize a new Post-2020 Global Biodiversity Framework (GBF) within the Convention on Biological Diversity (CBD) at its 15th Conference of the Parties (CBD COP 15).

To raise awareness for the importance of an ambitious GBF and a concrete and effective transformative actions on the ground to ensure reaching its goals and targets, the project performs knowledge transfer, technical assistance and communication at different levels:

- Provision of technical assistance in 10 partner countries<sup>1</sup>;
- Organization of events, workshops and dialogues in 10 partner countries and globally at international forums.

The project will provide travel, accommodation and subsistence arrangements to a wide variety of target representatives from the following groups (among others):

- National governments and its institutions relevant for the implementation of biodiversity policy;
- UN and other international organizations, including regional organizations within and outside the strict biodiversity arena;
- Representatives of Subnational and Local Governments (SNLGs) and stakeholders involved at these levels of governance;
- Global and national NGOs and civil society, including Youth, Women, Indigenous Peoples and Local Communities (IPLCs), faith organizations, philanthropy, etc.;
- The private and finance sector, including development banks and business organizations in various sectors;

<sup>1</sup> Brasil, China, Colombia, Costa Rica, India, Mexico, Morocco, Peru, South Africa, Uganda.

- Science and scientific organizations and panels.

The project needs to outsource the provision of economically and logistically advantageous options for travel, accommodation; subsistence and technical and site logistics. A mechanism for a prompt and effective validation of options, management of activities, trouble shooting on site (including power of signature and payment of the service provider's local staff on site), as well as contract management, monitoring, reporting and financial management will be needed.

### III. Objectives and desired results

#### 1) General objective

The objective of the assignment is to organize, manage and oversee the logistical and administrative aspects of the events and technical missions that will be organized within the "POST 2020 BIODIVERSITY FRAMEWORK - EU SUPPORT".

The service provider will be responsible for the successful management of all the logistics and non-biodiversity related aspects of these events and technical missions.

#### Overview of the framework contract

3 regional lots:

- Americas,
- Africa,
- Asia.
- Europe and international

Number of events expected: minimum 36

Maximum amount available for activities related to this framework contract (all Lots): 1 000 000€

#### 2) Specific objectives

1. To organize, implement and report economically and technically advantageous travel, accommodation and subsistence arrangements for participants in all partner countries and internationally (corresponding to each Lot);
2. To organize, implement and report economically and technically advantageous logistic services for events and technical missions in all partner countries and internationally (corresponding to each Lot);

#### 3) Anticipated results

##### 3.1) Travel Management

Organized and implemented travel, accommodation and subsistence arrangements for all participants for different types of project events / missions:

- National technical assistance missions (between 2 and 4 participants)
- National workshops and dialogues (up to 200 participants)
- Regional/international workshops and dialogues (up to 100 participants)

- Study visits (up to 20 participants)
- Side events in multilateral and international events (up to 20 participants)
- Other (to be defined)

### 3.2) Logistics arrangements

Organized and implemented logistics arrangements for different types of project events / missions (see above for types of events/missions), including:

- Invitation and registration of participants;
- Venue booking and management (including room technical equipment and virtual tools);
- Catering services;
- Shuttle services
- On-site assistance;
- Interpretation services and translation;
- Other.

### 3.3) Reporting

Monitored, evaluated and (technically and (financially) reported arrangements for travel accommodation and subsistence, as well as logistics, including:

- Monitoring data (e.g. detailed lists of participants, to be defined according to the project's monitoring framework and delivered on the project's templates);
- Event evaluation and follow-up (Expertise France form's template);
- Report on delivery of Daily Subsistence Allowance (DSA) to the participants;
- Technical and financial reporting of the service provided in accordance with Expertise France rules.

## **IV. Description of the assignment**

### **1) Planned activities**

The service provider must support the project Post 2020 Biodiversity Framework - EU Support in line with the proposed methodology in order to perform the following activities:

#### **1.1) Invitation and registration of participants**

Mailing of invitations: the Event organiser will send out the invitations (by e-mail or Zoom) according to Expertise France's instructions and based on templates provided (agenda, invitation letter, registration form). It will include any administrative and practical information in relation to the event.

The Event organiser will ensure that invitees have received the invitation package by systematically re-contacting by e-mail and telephone those invitees who did not reply to the first announcement. On this basis, the Event organiser will prepare a report to be sent to Expertise France for further action.

Registration of participants: once the registration process has begun (over an adequate platform or tool), the Event organiser will regularly provide Expertise France with up-to-date and accurate registration reports in spreadsheet form. The Event organiser must be able to produce registration reports at short notice.

The registration report must include the following information:

- participants' contact details, affiliation; function, type of organization and gender (incl. non-binary option/s);
- travel itinerary (dates and times of arrival and departure, flight numbers);
- assigned hotel, detailing the nights covered by Expertise France and those covered by the participants themselves should they choose to extend their stay;
- comments (any other information about the participants).
- Any other information deemed necessary may also be included if requested by Expertise France

The registration report must be organised in such a way as to allow multiple sorting (by any category of information, e.g. name, country, hotel, etc.). The Event organiser will keep Expertise France regularly informed about progress in registrations, so that, for example, replacement participants can be selected.

### **1.2) Travel arrangements**

#### International and national travels

Travel arrangements will be made for the list of sponsored participants provided by Expertise France. Travels means:

- the journey from the participant's place of employment to the place where the event will take place;
- the transport between the airport, the hotel and event venue;
- transfers between the airport and the hotel during transit flights, if applicable.

These services will only be provided if the hotel accommodating the participants is unable to organise a shuttle service.

Flights must be booked from the airport nearest the participant's place of employment to the airport in the city where the event will take place.

The Event organiser will make travel arrangements on their behalf, including organising pre-paid travel tickets and liaising with airlines and travel agencies.

The Event organiser will communicate directly with participants on travel arrangements, facilitate arrangements for visas for participants, as needed, etc.

#### Local and tour logistic

In case of study visits or field trips, the event organiser will provide every means of transport necessary (minibus rental, train tickets booking, etc.).

### **1.3) Accommodation booking**

The Event organiser will ensure participants accommodation:

- Book the rooms of the hotel and inform participants of their hotel reservation and/or provide confirmation;

- Settle hotel bills on behalf of participants based on the list provided by the contracted authority;
- Manage hotel reservations and provide Expertise France with early information on the option deadlines, cut-off dates and cancellation policies, and procedures for early arrivals and late check-outs;
- Prepare and send the rooming list to the hotel(s) by the deadline specified;
- Monitor changes to the rooming list (new reservations, cancellations and no-shows) in order to minimise penalties;
- Review hotel invoices (cross-check hotel attendance lists, including no-show reports, in line with the organiser's lists).

Hotel rooms must be guaranteed (no overbooking).

The Event organiser will prepare and send the rooming list to the hotel in due time and will manage early arrivals and late departures. There should be regular communication with the hotel during the event (dealing with arrivals, new reservations, changes, cancellations and no-shows).

Flexibility is needed on rooming list deadlines and last-minute change. Should a participant opt to stay in a hotel other than one of those selected by the Event organiser, the booking will not be arranged by the Event organiser and will not be reimbursed by Expertise France, except in the case of unforeseen circumstances (e.g. unavailability of rooms in the selected hotel). The Event organiser will not finance or reimburse any other hotel arrangements made by the participant without prior written authorisation from Expertise France.

**Participants' accommodation should preferably be located in the conference centre / hotel where the workshop will take place.** If not, participant's accommodation should be located within walking distance of the conference centre / hotel. If not, a mean of transport should be provided.

### 1.4) Venue booking

The Event organiser must take into account the number of participants, accessibility and security in the local area. The hotel and/or the event centre should be in a central location which has good public transport connections and is within easy reach of the airport.

The Event organiser will identify the venue that best suit Expertise France requirements and negotiate the best rates and contractual conditions, including cancellation and payment policies. They must include details about the welcome reception, plans of the meeting rooms, and copies of the rates and cancellation policy.

The applicant must have in mind that Expertise France may have a meeting room pro bono from one of its partners. If this is the case, then this service will not be provided by the Event organiser and will not be included in the budget.

The Event organiser must arrange and ensure that the venue/conference room is ready and that required audio-visual equipment, service maintenance, facilities and catering services are available prior to the start of the event.

### 1.5) Catering services

Catering services should be delivered in the conference centre/ hotel where the event will take place. Catering services include:

- Morning and afternoon breaks;
- The provision of refreshments and mineral water in the event and breakout rooms.

If catering services are not provided by the event venue or hotel in which the event will take place, the contractor may be asked to find catering suppliers. All catering-related costs (staff, transport, insurance, furniture, uniforms, etc.) will be included in the catering price.

In case of study visit or field trip, a lunch box may be provided to all participants.

### 1.6) On-site assistance

The Event Organiser is responsible for ensuring that on-site support staff with relevant experience and decision making, signature and payment mandate (or 24 hour availability of supervising staff with this mandate to accommodate different time zones) are available throughout the event to carry out duties such as:

- welcoming participants at the airport and/or hotel upon arrival and accompanying them upon departure, if requested;
- welcoming participants at the event, distributing name badges, event kits, and other printed documents deemed necessary etc.;
- arranging and managing participants' registration on-site;
- supporting EF staff regarding logistical and administrative issues during the event;
- providing technical equipment;
- trouble shooting and quality assurance, including providing additional services after written validation by Expertise France.

The Event organiser's representatives will act as contact persons for the participants. Event organiser's representatives must be well-briefed about the event. They must be aware of all organisational matters relating to the event so they can answer participants in a clear and confident way. The same team must be available throughout the event.

The Event organiser is responsible for **compiling a list of participants' signatures to be used to verify the eligibility of costs**. The list of participants must be based on the most up-to-date registration report.

#### Technical equipment

The Event organiser will ensure that all technical equipment functions efficiently. Faulty equipment will be replaced within two hours.

According to Expertise France request, the Event organiser will be responsible for hiring appropriate event equipment for the duration of the event (wireless equipment, audio-visual, IT, flipcharts, etc.).

#### Printed documents and event material

The Event organiser will use the project communication supports to ensure that Expertise France's visual identity is consistent on all hard-copy and electronic communication (correspondence, agenda,

speakers' papers, folders, name badges, name plates, etc.). Expertise France will provide the contractor with all required logos and documentation concerning its visual identity.

The Event organiser may be asked to design, produce, print and supply event kits. These will include all documentation specified by Expertise France and must comply with Expertise France's visual identity rules. The event kit may include name tags, pens and writing pads for all participants. The event kit will be prepared and produced in advance of the event and distributed to participants upon their arrival at the event.

It must be possible to print additional name badges and name plates on the spot in all venues.

### **1.7) Interpretation services and translation**

The Event organizer should be able to provide interpretation and translation services at special request, either through their own capacities or through another service provider.

The interpreting services will have to be simultaneous during workshops in order to provide the attendees with a complete understanding. The interpretation provided during study visits will have to be portable and then to use interpretation facilities (audio headset and microphone). Languages concerned are English, Spanish, French and Chinese. However, this is not an exhaustive list and some specific events may require other languages.

The translation services concern any written document that Expertise France has deemed necessary.

### **1.8) Event evaluation and follow-up**

#### Survey of participants

The Event organiser will provide a survey (paper or online) for the evaluation of the event. This will be based on a questionnaire, drafted by Expertise France, to be filled in by the participants. The survey will be sent to Expertise France for approval approximately one week before the start of the event.

#### Follow-up

The Event organiser will hold a debriefing session with Expertise France after the event. The Event organiser will provide Expertise France with the final registration data, including the final list of participants, cancellations or replacement participants, dates and times of arrivals and departures, number of nights' accommodation, etc. It will organise any follow-up necessary.

### **1.9) Delivery of Daily Subsistence Allowance (DSA)<sup>2</sup>**

Sponsored participants will receive DSA for the duration of the workshop. The Event organiser will be in charge of DSA management, including calculation of the amounts, cash withdrawal, distribution and any other follow-up actions. Expertise France will provide the Event organiser with the list of sponsored participants.

DSA total allocation will depend on the number of participants.

DSA includes: accommodation fees, subsistence costs, mobile phone costs and transportation costs (within the location, excluded the shuttles) related to the event.

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<sup>2</sup> Also called « Per Diem » (ex : in the EU templates)

### DSA Calculation

As accommodation costs will be covered by the Event organiser directly, DSA allocation must be calculated with respect to Expertise France DSA procedure as follow, in one of two ways:

- Overall DSA Amount = (DSA rate x Number of nights) – (Accommodation Unit Price x Number of nights) or,
- Overall DSA Amount = DSA rate x 0,35 x Number of nights (If accommodation is paid directly by event organisers) or if accommodation is free of charge, only 35% per diem is paid for meals).

### DSA Procedure

- For each participant, the overall DSA amount must be passed cash by hand at their arrival in local money;
- Depending on Expertise France request, the currency may be Euros, US dollar or local money;
- A receipt form (in Annex II), attesting the amount of cash given must be signed by the participant.

### Invoice

To invoice all the DSAs to Expertise France, it must be provided:

- A list with the name of each participant, the dates of arrival and departure and the related DSA amount;
- Scans of Boarding Passes (at least the arrival one);
- Receipt forms.

DSA are submitted to a very specific way of billing. The price are firms and cannot be negotiated. Expertise France must foresee its managing fees separated in the “Overall coordination” budget spreadsheet.

### **1.10) Reporting of the service provided**

A technical and financial report will be provided to Expertise France **ten days after the event** at the latest.

The final financial report must be presented as a spreadsheet, and must include a concise and clear description of all expenses incurred and specified in the contract. All prices must be expressed in euros. If conversions are required, the rate must be taken on the European website *Inforeuro*<sup>3</sup> and be clearly indicated in the financial report.

The following documents must be annexed to the financial report:

- A list of participants with final registration data, including the final list of participants, cancellations or replacement participants, dates and times of arrivals and departures, number of nights’ accommodation, DSA amount;
- Certified copies of all invoices;

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<sup>3</sup> [http://ec.europa.eu/budget/contracts\\_grants/info\\_contracts/inforeuro/index\\_fr.cfm](http://ec.europa.eu/budget/contracts_grants/info_contracts/inforeuro/index_fr.cfm)

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- If requested, any other supporting document.

The Event organiser will collect all the invoices related to the event, and will prepare one final detailed invoice. The invoice must be accompanied by a detailed report prepared according to the below specifications.

The following supporting documents will be required for each post:

<b>Travel arrangements</b>	Scan of the participant Boarding Pass
<b>Accommodation booking</b>	Invoice (original or certified copies)
<b>Venue booking</b>	Invoice (original or certified copies)
<b>Catering</b>	Invoice (original or certified copies)
<b>Interpretation services and translation</b>	Invoice (original or certified copies)
<b>Overall coordination (fees)</b>	Event Organiser invoice A list of participants with final registration data, cancellations or replacement participants, dates and times of arrivals and departures, number of nights' accommodation, DSA amount; DSA receipts signed <sup>4</sup> Scan of the participant Boarding Pass Monitoring report Event evaluation and follow-up Satisfaction Survey

## 2) Personnel requirements and additional networks

The Event organiser is required to provide all resources and networks necessary to successfully fulfil the requirements of this Scope of Services. In some instances, that may include the provision of external services such hotels, transport, or other travel agent services. The Event organiser will also be required to provide appropriate and well qualified personnel as part of their core team to support the delivery of these services.

To ensure that the work is carried out successfully, **the Event organiser should appoint one project manager**. S/he is responsible for:

- implementing logistical activities and services specified by Expertise France;
- maintaining regular communication with participants and Expertise France;
- reviewing all activities on an ongoing basis and being proactive;
- managing the event on site.

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<sup>4</sup> Refer to the template annexed

**The Event organiser shall also assign supporting staff** with the qualifications needed to ensure a high level of service for each specific event. The Event organiser must guarantee that the team assigned to this event is sufficient to ensure a consistently high level of service in accordance with the contractual obligations. The team need to be fluent in English.

Staff assigned must be able to respond to any request from Expertise France or event participants as soon as possible.

### **3) Quality-control system**

The service provider will ensure a high-level coordination with Expertise France and Preparatory meetings.

After the contract is signed and on Expertise France's request, one or more preparatory meeting(s) will be held between the project manager and Expertise France. These meetings will make it possible to discuss the detailed planning of the event and to monitor the evolution and quality of the services being provided under the specific contract. The Event organiser will prepare minutes of all meetings.

The candidates are expected to provide a list of risks and measures for their mitigation with his methodology, including issues related to headquarters and local staff and service providers and different time zones, tax and financial legal framework for contracting services and equipment and intercultural aspects related to quality and punctuality of services.

The activities must be controlled by different monitoring actions established to ensure the smooth running of the assignment and allow timely decisions when required.

#### 4) Coordination

The service provider shall designate a single contact person for project implementation purposes. Ms. Natalia Mendes of the Sustainable Department will be the service provider's sole contact person for Expertise France.

Tel: +33 (0)1 70 82 72 46

E-mail: [natalia.mendes@expertisefrance.fr](mailto:natalia.mendes@expertisefrance.fr)

A launch meeting shall be held 5 days after the contract award has been notified.

Close collaboration must take place with Expertise France personnel from assignment preparation right up to completion. Furthermore, regular exchanges must take place with Ms. Natalia Mendes on assignment progress and any difficulties that may be encountered.

### V. Place, duration and terms of performance

- 1) Implementation period: 09/2022 - 10/2024
- 2) Start date: 01/09/2022
- 3) End date: 31/10/2024
- 4) Effective duration per assignment: 24 months
- 5) Schedule/programme:

*The provisional programme for assignment implementation is as follows:*

Activity	Place	Period (indicative planning)
Organisation of 08 events	Latin America	<ul style="list-style-type: none"> <li>• 2022: 02 events</li> <li>• 2023: 03 events</li> <li>• 2024: 03 events</li> </ul>
Organisation of 13 events	Africa	<ul style="list-style-type: none"> <li>• 2022: 05 events</li> <li>• 2023: 04 events</li> <li>• 2024: 04 events</li> </ul>
Organisation of 05 events	Asia	<ul style="list-style-type: none"> <li>• 2023: 02 events</li> <li>• 2024: 03 events</li> </ul>
Organisation of 10 events	Europe/ international	<ul style="list-style-type: none"> <li>• 2022: 02 events</li> <li>• 2023: 04 events</li> <li>• 2024: 04 events</li> </ul>
<b>Total</b>		<b>36 events</b>

## VI. Required expertise and profile

1) **Number of experts per assignment:** Minimum headcount of 3 persons responsible for logistics and event management in the geographical area of the respective event.

2) **Profile of the designated expert(s) responsible for contract execution**

A. Qualifications and skills:

- Holder of a postgraduate university degree in a Business Administration, Business Management, Marketing, Communications Science, Project Management or equivalent experience.
- Excellent qualities/capacities in:
  - Communication
  - Teamwork and interpersonal skills
  - Analysis and reporting
  - Problem identification and resolution
  - Decision-making and taking initiatives
- High proficiency in written and spoken French, English and Spanish, depending on the country in question.

B. General professional experience

- Professional experience of at least 5 years in the field of International Event Management, notably in Africa, Latin America, Asia and/or in other countries.
- Professional experience of at least 5 years in relation to logistics, planning and other services related to events.

C. References

- Three of most relevant international events in the last three years.

## VII. Assignment reports

A report following the model provided must be forwarded by e-mail on conclusion of the assignment: it must correspond with the deliverable summary analytical report ...

## VIII. Monitoring-evaluation

### Performance indicators

Deliverables	Immediate effects	Intermediate effects	Verification sources
Event preparation	<ol style="list-style-type: none"> <li>1. Logistical and thematic organization oversight</li> <li>2. Confirmation of the assignment objectives and of the workshop quality expected</li> </ol>		Preparatory package  Note containing: - Understanding of the mission - Details on logistics matters asked by the

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			contract authority - Quotation
Event monitoring and coordination	3. On-site support staff ensured 4. Smooth technical unfolding of the workshop ensured		Feedbacks from participants collected through the surveys
Event evaluation and follow-up	5. Participants report having benefited from the event		Lists of participants/registration forms  Number of participants recorded through the attendance list  Feedbacks from participants collected through the surveys

### IX. Practical information

List of countries targeted by the project

Please, note that the list is indicative. Events may not be organised in all countries below. Nevertheless, events may be organized also in other countries deeply involved in the run-up to the COP 15 and its subsequent implementation.

Regional lot 1 - Americas
Brazil, Colombia, Costa Rica Mexico, Peru, Canada, among others
Regional lot 2 – Africa
South Africa, Uganda, among others
Regional lot 3 – Asia and Oceania
China, India, among others
Lot 4 – Europe and International
European Union and other countries

# DSA Receipt Form template

## Per Diem Receipt Form

Name of Event \_\_\_\_\_

Location of Event \_\_\_\_\_

My signature below acknowledges receipt of \_\_\_\_\_ for meals and incidentals.

## Name Signature ID

Name	Date of arrival	Date of departure	DSA amount	Signature
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