



# Request for Proposals (RfP) IUCN Congress 2025 virtual platform and programme management system

**IUCN Secretariat, Headquarters Gland Switzerland,  
Global Convenings and Events Unit  
RfP Reference: IUCN-08-12-P04213-002**

Welcome to this Procurement by IUCN. You are hereby invited to submit a Proposal. Please read the information and instructions carefully because non-compliance with the instructions may result in disqualification of your Proposal from this Procurement.

## 1. REQUIREMENTS

- 1.1. A detailed description of the services and/or goods to be provided can be found in Attachment 2.

## 2. CONTACT DETAILS

- 2.1. During the course of this procurement, i.e., from the publication of this RfP to the award of a contract, you may not discuss this procurement with any IUCN employee or representative other than the following contact. You must address all correspondence and questions to the contact, including your Proposal.

IUCN Contact: Sina Bunte, [congress@iucn.org](mailto:congress@iucn.org) with copy to [sina.bunte@iucn.org](mailto:sina.bunte@iucn.org).

## 3. PROCUREMENT TIMETABLE

- 3.1. This timetable is indicative and may be changed by IUCN at any time. If IUCN decides that changes to any of the deadlines are necessary, we will publish this on our website and contact you directly if you have indicated your interest in this procurement (see Section 3.2).

DATE	ACTIVITY
08 December 2023	Publication of the Request for Proposals
15 December 2023	Deadline for expressions of interest
20 December 2023	Deadline for submission of questions
22 December 2023	Planned publication of responses to questions
15 January 2023	Deadline for submission of Proposals to IUCN (" <b>Submission Deadline</b> ")
22 January 2024	Clarification of Proposals
25-26 January 2024	Interviews and presentation for shortlisted candidates
1 February 2024	Second round of interviews and demos
8 February 2024	Planned date for contract award
1 March 2024	Expected contract start date
18 March 2024	Kick-off meeting

- 3.2. Please email the IUCN contact to express your interest in submitting a Proposal by the deadline stated above. This will help IUCN to keep you updated regarding the procurement.

#### 4. COMPLETING AND SUBMITTING A PROPOSAL

4.1. Your Proposal must consist of the following four separate documents:

- Signed Declaration of Undertaking (see Attachment 2)
- Pre-Qualification Information (see Section 4.3 below)
- Technical Proposal (see Section 4.4 below)
- Financial Proposal (see Section 4.5 below)

Proposals must be prepared in English.

4.2. Your Proposal must be submitted by email to the IUCN Contact (see Section 2). The subject heading of the email shall be [RfP Reference – bidder name]. The bidder name is the name of the company/organisation on whose behalf you are submitting the Proposal, or your own surname if you are bidding as a self-employed consultant. Your Proposal must be submitted in PDF format. You may submit multiple emails suitably annotated, e.g., Email 1 of 3, if attached files are too large to suit a single email transmission. You may not submit your Proposal by uploading it to a file-sharing tool.

**IMPORTANT:** Submitted documents must be password-protected so that they cannot be opened and read before the submission deadline. Please use the same password for all submitted documents. After the deadline has passed and within 12 hours, please send the password to the IUCN Contact. This will ensure a secure bid submission and opening process. Please DO NOT email the password before the deadline for Proposal submission.

4.3. *Pre-Qualification Criteria*

IUCN will use the following Pre-Qualification Criteria to determine whether you have the capacity to provide the required goods and/or services to IUCN. Please provide the necessary information in a single, separate document.

1.	Provision of three (3) relevant references of clients like IUCN for comparable work
2.	Confirmation of having all the necessary legal registrations to perform the work.
3.	Confirmation of having been in business for at least three (3) years.
4.	Statement of the annual turnover for each of the past three (3) years.
5.	How many employees does your organisation have who are qualified for this work?
6.	Confirm that your organisation has formal policies and procedures to safeguard General Data Protection Regulations.
7.	Confirm that your organisation has formal policies and/or procedures for the following: code of conduct, sustainability, gender mainstream, carbon offset, anti-fraud, etc.
8.	Confirmation that required systems are developed in-house or already integrated with sub-systems, customisations are possible and timeline, including potential customisations can be met.

4.4. *Technical Proposal*

The Technical Proposal must address each of the criteria stated below explicitly and separately, quoting the relevant criteria reference number (left-hand column).

Proposals in any other format will significantly increase the time it takes to evaluate, and such Proposals may therefore be rejected at IUCN's discretion.

Should you provide CVs in your proposal, these must be of the individuals who will actually carry out the work specified. The individuals you put forward may only be substituted with IUCN's approval.

IUCN will evaluate Technical Proposals with regards to each of the following criteria and their relative importance:

	Description	Information to provide	Relative weight
1	Technical approach and proposed technologies	Detailed technical proposal to meet the technical requirements and integration requirements	35%
2	Implementation plan	Detailed implementation plan to meet the 2025 Congress key dates, risks analysis and mitigation strategies	20%
3	Experience in developing and handling projects of similar size and scope	Three relevant case studies of completed projects of similar scope including client references	20%
4	Maintenance and technical support	Detailed maintenance and technical support plan including SLAs	10%
5	Graphic interface and responsiveness	Three relevant examples of virtual platform, Mobile App and responsiveness currently live	10%
6	Company evaluation	Company presentation including vision, history, expertise, structure as well as available staff dedicated to the project	5%
TOTAL			100%

#### 4.5. Financial Proposal

4.5.1. The Financial Proposal must be a fixed and firm price for the provision of the goods/services stated in the RfP in their entirety.

#### 4.5.2. *Prices include all costs*

Submitted rates and prices are deemed to include all costs, insurances, taxes (except VAT, see below), fees, licenses, expenses, liabilities, obligations, risk and other things necessary for the performance of the Scope of services. IUCN will not accept charges beyond those clearly stated in the Financial Proposal.

This includes applicable withholding taxes and similar. It is your responsibility to determine whether such taxes apply to your organisation and to include them in your Financial Proposal.

#### 4.5.3. *Applicable Goods and Services Taxes*

Proposal rates and prices shall be exclusive of Value Added Tax.

#### 4.5.4. *Currency of proposed rates and prices*

All rates and prices submitted by Proposers shall be in Swiss Francs (CHF).

#### 4.5.5. *Breakdown of rates and prices*

For information only, the price needs to be broken down as follows and presented in your quote:

	Description	Information to provide	Price
1	Virtual platform license fee	Cost for using virtual platform. Please indicate cost per user, branding costs, period of usage, attendee's interactivity (chats, instant messaging), calendar sync etc.	
2	License fee mobile app	Cost for using mobile app	
3	License fee programme management system	Cost for using programme management system. Please indicate cost for session	

		submission, review, speaker portal, speaker video recording, hosting, distribution services, livestream, upload presentation system, trimming and simple editing before uploading etc.	
4	Set up and customisation	Cost for set up and customisation of systems, forms, emails, data systems integrations, deployment, testing, etc.	
5	Support	Dedicated customer support for IUCN throughout project training, kick-off and dry run. Dedicated virtual helpdesk	
6	Onsite support and staff	Cost for: <ul style="list-style-type: none"> <li>- two onsite customer support people to answer participant's questions at the registration desk.</li> <li>- Staff to handle the onsite presentation system support. Please suggest amount of people needed.</li> <li>- Staff to coordinate with local streaming and AV company to manage livestream on the platform</li> <li>- Contact person / project manager</li> <li>- Please include cost for travel, per diem and accommodation.</li> </ul>	
7	Speaker recording and editing of recordings	Assisting speakers with recording their presentation.	
	TOTAL		

4.6. Additional information not requested by IUCN should not be included in your Proposal and will not be considered in the evaluation.

4.7. Your Proposal must remain valid and capable of acceptance by IUCN for a period of 90 calendar days following the submission deadline.

4.8. *Withdrawals and Changes*

You may freely withdraw or change your Proposal at any time prior to the submission deadline by written notice to the IUCN Contact. However, in order to reduce the risk of fraud, no changes or withdrawals will be accepted after the submission deadline.

**5. EVALUATION OF PROPOSALS**

5.1. *Completeness*

IUCN will firstly check your Proposal for completeness. Incomplete Proposals will not be considered further.

5.2. *Pre-Qualification Criteria*

Only Proposals that meet all of the pre-qualification criteria will be evaluated.

5.3. *Technical Evaluation*

5.3.1. *Scoring Method*

Your Proposal will be assigned a score from 0 to 10 for each of the technical evaluation criteria, such that '0' is low and '10' is high.

### 5.3.2. *Minimum Quality Thresholds*

Proposals that receive a score of '0' for any of the criteria will not be considered further.

### 5.3.3. *Technical Score*

Your score for each technical evaluation criterion will be multiplied with the respective relative weight (see Section 4.4) and these weighted scores added together to give your Proposal's overall technical score.

### 5.4. *Financial Evaluation and Financial Scores*

The financial evaluation will be based upon the full total price you submit. Your Financial Proposal will receive a score calculated by dividing the lowest Financial Proposal that has passed the minimum quality thresholds (see Section 5.3.2) by the total price of your Financial Proposal.

Thus, for example, if your Financial Proposal is for a total of CHF 100 and the lowest Financial Proposal is CHF 80, you will receive a financial score of  $80/100 = 80\%$

### 5.5. *Total Score*

Your Proposal's total score will be calculated as the weighted sum of your technical score and your financial score.

The relative weights will be:

<b>Technical:</b>	<b>75%</b>
<b>Financial:</b>	<b>25%</b>

Thus, for example, if your technical score is 83% and your financial score is 77%, you will receive a total score of  $83 * 75\% + 77 * 25\% = 53.95\% + 26.95\% = 80.9\%$ .

IUCN will identify and shortlist the top three scoring suppliers, inviting them to participate in the second round of interviews or demonstrations.

Subject to the requirements in Sections [4](#) and [7](#), IUCN will award the contract to the bidder whose Proposal achieves the highest total score.

## 6. **EXPLANATION OF PROCUREMENT PROCEDURE**

- 6.1. IUCN is using the Open Procedure for this procurement. This means that the contracting opportunity is published on IUCN's website and open to all interested parties to take part, subject to the conditions in Section 7 below.
- 6.2. You are welcome to ask questions or seek clarification regarding this procurement. Please email the IUCN Contact (see Section 2), taking note of the deadline for submission of questions in Section 3.1.
- 6.3. All Proposals must be received by the submission deadline in Section 3.1 above. Late Proposals will not be considered. All Proposals received by the submission deadline will be evaluated by a team of three or more evaluators in accordance with the evaluation criteria stated in this RfP. No other criteria will be used to evaluate Proposals.
- 6.4. The bidders of the top three Proposals will be invited to a first round of presentations where they will have the opportunity to present their company and their submission. During the first round of presentations IUCN may take to opportunity to ask for clarifications if something is not clear from the submission. A second round of presentations may be required if IUCN still has questions regarding the proposal. Information gathered during the presentations will be used by the evaluators to amend their scores if needed.
- 6.5. The contract will be awarded to the bidder whose Proposal received the highest Total Score. IUCN does, however, reserve the right to cancel the procurement and not award a contract at all.
- 6.6. IUCN will contact the bidder with the highest-scoring Proposal to finalise the contract. We will contact unsuccessful bidders after the contract has been awarded and provide detailed feedback. The timetable in Section 3.1 gives an estimate of when we expect to have completed the contract award, but this date may change depending on how long the evaluation of Proposals takes.

## 7. **CONDITIONS FOR PARTICIPATION IN THIS PROCUREMENT**

- 7.1. To participate in this procurement, you are required to submit a Proposal, which fully complies with the instructions in this RfP and the Attachments.

- 7.1.1. It is your responsibility to ensure that you have submitted a complete and fully compliant Proposal.
- 7.1.2. Any incomplete or incorrectly completed Proposal submission may be deemed non-compliant, and as a result you may be unable to proceed further in the procurement process.
- 7.1.3. IUCN will query any obvious clerical errors in your Proposal and may, at IUCN's sole discretion, allow you to correct these, but only if doing so could not be perceived as giving you an unfair advantage.
- 7.2. In order to participate in this procurement, you must meet the following conditions:
- Free of conflicts of interest
  - Registered on the relevant professional or trade register of the country in which you are established (or resident, if self-employed)
  - In full compliance with your obligations relating to payment of social security contributions and of all applicable taxes
  - Not been convicted of failing to comply with environmental regulatory requirements or other legal requirements relating to sustainability and environmental protection
  - Not bankrupt or being wound up
  - Never been guilty of an offence concerning your professional conduct
  - Not involved in fraud, corruption, a criminal organisation, money laundering, terrorism, or any other illegal activity.
- 7.3. You must complete and sign the Declaration of Undertaking (see Attachment 2).
- 7.4. If you are participating in this procurement as a member of a joint venture, or are using sub-contractors, submit a separate Declaration of Undertaking for each member of the joint venture and sub-contractor, and be clear in your Proposal which parts of the goods/services are provided by each partner or sub-contractor.
- 7.5. Each bidder shall submit only one Proposal, either individually or as a partner in a joint venture. In case of joint venture, one company shall not be allowed to participate in two different joint ventures in the same procurement nor shall a company be allowed to submit a Proposal both on its behalf and as part of a joint venture for the same procurement. A bidder who submits or participates in more than one Proposal (other than as a subcontractor or in cases of alternatives that have been permitted or requested) shall cause all the Proposals with the bidder's participation to be disqualified.
- 7.6. By taking part in this procurement, you accept the conditions set out in this RfP, including the following:
- It is unacceptable to give or offer any gift or consideration to an employee or other representative of IUCN as a reward or inducement in relation to the awarding of a contract. Such action will give IUCN the right to exclude you from this and any future procurements, and to terminate any contract that may have been signed with you.
  - Any attempt to obtain information from an employee or other representative of IUCN concerning another bidder will result in disqualification.
  - Any price fixing or collusion with other bidders in relation to this procurement shall give IUCN the right to exclude you and any other involved bidder(s) from this and any future procurements and may constitute a criminal offence.

## **8. CONFIDENTIALITY AND DATA PROTECTION**

- 8.1. IUCN follows the European Union's General Data Protection Regulation (GDPR). The information you submit to IUCN as part of this procurement will be treated as confidential and shared only as required to evaluate your Proposal in line with the procedure explained in this RfP, and for the maintenance of a clear audit trail. For audit purposes, IUCN is required to retain your Proposal in its entirety for 10 years after the end of the resulting contract and make this available to internal and external auditors and donors as and when requested.
- 8.2. In the Declaration of Undertaking (Attachment 2) you need to give IUCN express permission to use the information you submit in this way, including personal data that forms part of your Proposal. Where you include personal data of your employees (e.g., CVs) in your Proposal, you need to have written permission from those individuals to share this information with IUCN, and for IUCN to use this information as indicated in 8.1. Without these permissions, IUCN will not be able to consider your Proposal.

## 9. COMPLAINTS PROCEDURE

If you have a complaint or concern regarding the propriety of how a competitive process is or has been executed, then please contact [procurement@iucn.org](mailto:procurement@iucn.org). Such complaints or concerns will be treated as confidential and are not considered in breach of the above restrictions on communication (Section 2.1).

## 10. CONTRACT

The contract will be based on IUCN's template in Attachment 3, the terms of which are not negotiable.

## 11. ABOUT IUCN

IUCN is a membership Union uniquely composed of both government and civil society organisations. It provides public, private and non-governmental organisations with the knowledge and tools that enable human progress, economic development and nature conservation to take place together.

Headquartered in Switzerland, IUCN Secretariat comprises around 1,000 staff with offices in more than 50 countries.

Created in 1948, IUCN is now the world's largest and most diverse environmental network, harnessing the knowledge, resources and reach of more than 1,300 Member organisations and some 10,000 experts. It is a leading provider of conservation data, assessments and analysis. Its broad membership enables IUCN to fill the role of incubator and trusted repository of best practices, tools and international standards.

IUCN provides a neutral space in which diverse stakeholders including governments, NGOs, scientists, businesses, local communities, indigenous peoples organisations and others can work together to forge and implement solutions to environmental challenges and achieve sustainable development.

Working with many partners and supporters, IUCN implements a large and diverse portfolio of conservation projects worldwide. Combining the latest science with the traditional knowledge of local communities, these projects work to reverse habitat loss, restore ecosystems and improve people's well-being.

[www.iucn.org](http://www.iucn.org)

<https://twitter.com/IUCN/>

### About the World Conservation Congress

As IUCN's highest profile event, the Congress attracts thousands of participants from across the world and is held every four years. The next Congress will be hosted by United Arab Emirates and will take place in Abu Dhabi from 9 to 15 October 2025.

The IUCN World Conservation Congress is where the world comes together to set priorities and drive conservation and sustainable development action. IUCN's 1400+ government, civil society and indigenous peoples' Member organisations vote on major issues, and decide on actions, which guide humanity's relationship with our planet for the decades ahead. IUCN's unique and inclusive membership gives the IUCN Congress a powerful mandate, as it does not simply bring together either government or non-government representatives, but convenes both.

The Congress offers an unparalleled opportunity to forge partnerships within and between the public and private sectors, and to implement global conservation initiatives that further IUCN's vision of a 'just world that values and conserves nature'. The most recent IUCN Congress, held in Marseille, France, in September 2021, brought together people from all parts of the globe onsite and online to discuss, debate and decide on actions to address critical environmental and development issues.

The IUCN Congress has three main components: the Forum, the Members' Assembly and the Exhibition. After the official opening ceremony of the Congress, there is a Forum, which kicks off with a high-level segment. The Forum is 3.5 days long and sessions take place in the morning only. It is open to all registered participants. The Exhibition runs over the same days as the Forum in the afternoon. The Assembly is also estimated to last 3.5 days and is attended by IUCN Members and observers. In total, the Congress lasts 7 days (not including meetings of Council and the time required for set-up and

dismantling).

The general outline for the Congress can be seen in Figure 1 below.

	D-1	D1	D2	D3	D4	D5	D6	D7	D8	
	Wednesday	Thursday	Friday	Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday	
		Opening	Forum			Assembly			Council	
AM		High-level segment								AM
PM	Council	Exhibition								PM
		Reception			Forum closing			Closing		
	08-Oct	09-Oct	10-Oct	11-Oct	12-Oct	13-Oct	14-Oct	15-Oct	16-Oct	

**The Forum** - The world’s largest marketplace of conservation knowledge - is a hub of public debate, bringing together people from around the world to discuss and develop solutions to the world’s most pressing conservation and sustainable development challenges. The sessions address the economic, social, scientific and technical aspects of issues ranging from wildlife to oceans, protected areas to sustainable business, and climate change to human rights. The Forum traditionally includes a range of events from High-Level Dialogues, to training and capacity building sessions, as well as social events. IUCN envisages between 5,000 and 10,000 registered Congress participants onsite, and several thousand online for the Forum, including government officials, decision-makers, heads of NGOs, scientists, representatives from Indigenous peoples’ organisations, sub-national governments, IUCN staff, as well as representatives from the private sector, partner organisations and foundations, and daily local visitors from the Host Country (“Participants”). For 2025, we are planning to hold some 100-150 Forum events run by our Member organisations, Commissions, partners, and by the Host Country, as well as by the IUCN Secretariat.

Session Type	Plenary / concurrent	Estimated total # of sessions	Format (onsite only, hybrid*, virtual only)	Duration
Forum Opening	Plenary	1	Hybrid*	90min
Forum Closing	Plenary	1	Hybrid*	60 – 90 min
High-level segment (e.g. summits)	Concurrent	4	Hybrid*	120 – 240 min each
High-level dialogues (panel discussion – moderator + 4/5 speakers)	Plenary	4	Hybrid*	90 min each (max)
Thematic plenaries	Concurrent	8	Hybrid*	90 min each (max)
Thematic Stream Sessions	Concurrent	50-75	25 hybrid* 25 virtual only	90 min each (max)
A Conversation with ... / An interview with ... (similar to a fireside chat – with	Plenary	6	Hybrid*	45 – 60 min each



moderator + 1 or 2 speakers at the max; more intimate discussion				
Breakfast with... (informal networking breakfast with high-level participants and young leaders)	Plenary / networking event	3	Onsite only	60 min each
Campus sessions (training / capacity building sessions)	Concurrent / plenary (if possible a few with nothing in parallel, usually before or after the official hours of the Forum programme)	10	Onsite only	120 – 240 min each
		15	Virtual only	120 – 240 min each
		10 – 15	Pre-recorded and released during or just before Congress	120 min each
Conservation Action Cafés (similar to world café format)	Plenary (ideally)	4 – 5	Onsite only	120 min each (min)
		4 – 5	Virtual only	120 min each (min)
Pitch events (moderator + 8-10 pitchers; similar to PechaKucha style event; each pitcher has 5 min to pitch using 10-15 slides)	Concurrent	5	Hybrid*	60 min each
		5	Virtual only	60 min each
Central stage events (assuming 4 Central stages in the exhibition and 5 time slots per day – 45min sessions with 45 min intervals between sessions; with stage and seating capacity of 100-120 pax each)	Concurrent	60 – 80	Hybrid*	45 min each
Exhibition stand events <b>(add-on for Exhibitor)</b> (sessions that will take place at medium + large exhibition stands; estimations based on 25 stand spaces; and events either 45 or 60 min long;	Concurrent	Max. 100	Hybrid*	45 – 60 min each

with 45 min intervals between sessions)				
Structured networking sessions (speed-networking or other forms of networking sessions)	Concurrent	3	Onsite only	60 min each
		3 – 6 / 8 ?	Virtual only	60 min each
Satellite Sessions (sold to third parties)	Concurrent	Max 30	Virtual only, onsite only or hybrid*	45 – 60 min each (TBC)
Members Assembly	Plenary	9	Hybrid*  Remote participation from Members (TBC)	3 - 4 hours each (TBC)
Motion Contact Groups	Concurrent	28 (TBC)	Hybrid*	1 hour each
			Virtual only (before Congress)	

*Hybrid\*:* The session will run on-site with livestreaming. The moderator and a minimum of two speakers will attend onsite. Other speakers may join live remotely for the duration of the session (all these are interactive panel discussions - not presentation sessions). Some speakers may pre-record their speech that will be livestreamed for onsite and virtual audience

**The Members' Assembly** is a unique global environmental parliament where Member organisations from government and civil society organisations establish environmental policy by adopting Resolutions and Recommendations, vote on IUCN's Programme of Work and Financial Plan for the following four years, elect the IUCN President and Council, and discuss issues of strategic importance to the Union. IUCN expects up to 1,400 onsite Participants for the Members' Assembly plus several hundred online. Voting on decisions could happen onsite and/or online. Additional meetings called contact groups, for up to 30 – 80 people with up to 7 in parallel will be held virtually, including partially ahead of the Members' Assembly itself.

**The Exhibition** - In the Exhibition, IUCN Members and Commissions, businesses, partners, and academia host pavilions, booths and events. The Exhibition is open to both Congress Participants and the general public, allowing exhibitors to showcase their research, innovations and other work to the broadest Congress audience. At previous Congresses, the exhibition had between 100 to 150 small, medium and large stands. In addition, several central open presentation areas, or "Central Stages" accommodating up to 150 people are included in the Exhibition zone. Sessions are organised at the central stages and at medium and large stands by exhibitors during the opening times of the exhibition. They might be broadcasted as well if exhibitors purchase the add-on.

On the day before and the day after Congress, a private meeting of the IUCN Council is held at the venue.

The official daily schedule of the Congress is approximately from 08:00 to 21:30 during Forum days and from 07:00 to 23:00 during Assembly days ("Daily Opening Hours"), possibly even longer. IUCN staff and Council members require access to the Convention Centre ("Venue") from 06:00 to 24:00 during the Congress and 07:00 to 20:00 during set-up and dismantling days.

Off-site events might be organised outside the official Programme. In addition, excursions will be offered by the Host Country for purchase by Participants at their leisure.

Participation in the Congress other than the Exhibition requires being registered. Registration will be handled by a separate provider through an online system (to be accessed through the Congress website). Registered participants can build their personal agenda and network with other participants.

The World Conservation Congress is a gender-responsive event aiming for equitable participation of women and men.

To learn more about the last Congress, visit <https://www.iucncongress2020.org/>

#### **About Regional Conservation Fora (RCF)**

Between sessions of the World Congress, a Regional Forum of Members will be held for each Region, or part of a Region, inter alia, to enable Members to participate in the preparation and evaluation of the programme and strategies of IUCN and to prepare for the next session of the World Congress.

Either the Members, or the Council, may convene a Forum. All Members of IUCN in the Region have the right to be invited to and participate in a Forum. A Forum may determine its own organisation. The Rules of Procedure of the World Congress shall apply mutatis mutandis to such Regional Fora.

The main objectives of each RCF are to:

- Provide IUCN Members with a platform to present input on a joint programme of action for addressing the region's challenges related to biodiversity conservation, sustainable development and natural resource management in the coming four years.
- Prepare Members for sessions of the Members' Assembly at the World Conservation Congress (WCC) and learn more about how to get involved in the WCC and related preparations.
- Provide an open venue where pressing issues at regional and international level are discussed and debated. Participants—are encouraged to share their insights on conservation challenges in the region and related cross-cutting issues.

## **12. ATTACHMENTS**

Attachment 1 *Objectives and expected results*

Attachment 2 *Specification of requirements*

Attachment 3 *Congress processes*

Attachment 4 *Example IUCN API*

Attachment 5 *Minimum qualifications*

Attachment 6 *Declaration of Undertaking*

Attachment 7 *Contract Template*

Attachment 1: Objectives and expected results

RFP No. **IUCN-23-11-P04213-002**

Issued 27 November 2023

The objectives of this RFP and the expected results from the services procured are as follows:

To secure a reputable virtual events platform, mobile app and programme management system with excellent references to provide reliable systems for participants and users attending the 2025 IUCN World Conservation Congress.

## Attachment 2: Specification of requirements

RFP No. **IUCN-23-11-P04213-002**

Issued 5 December 2023

### **Part 1: Virtual event platform**

The below indicated requirements are not the complete technical specifications but should, at this stage, be seen as minimum requirements.

We encourage the suppliers responding to the RFP to describe any useful feature, service and tool offered by the supplier that relate to the areas below or that IUCN may have missed in this document, which may enhance the final solution.

Please provide details and images introducing your virtual event platform.

The requirements for the virtual event platform for this procurement are as follows:

#### **1. General**

In addition to Congress, the virtual platform should be accessible for smaller IUCN Events spanning from June 2024 until Congress. IUCN events are described as follows:

##### **Virtual Platform only (Livestream, virtual speakers, interactivity)**

- Africa RCF in Nairobi, Kenya (end of June, date to be confirmed)
- Asia RCF in Bangkok, Thailand (3-5 September)
- Canada RCF in Ottawa, Canada (1-2 October – date under discussion)
- East Europe, North and Central Asia and West Europe RCF in Bruges, Belgium (30 September - 3 October)
- Mexico, Central America & the Caribbean RCF in Mexico City, Mexico (16-19 April)
- Oceania RCF in Suva, Fiji (ORO now exploring possibility of Melbourne, Australia, (21-25 October)
- South America RCF in Santa Marta, Colombia (14-18 October)
- USA RCF in Washington DC, USA (25-26 September)
- West Asia RCF in Riyadh, Saudi Arabia (date to be confirmed)

##### **Programme Management System and Virtual Platform (no virtual speaker)**

- IUCN Leaders Forum 2024 (Q4, 2024)

##### **Programme Management System and Virtual Platform (virtual speakers allowed)**

- Congress (9-15 October 2025)

#### **2. Languages**

The public interface of the platform has to be available in the three official languages, English, Spanish and French. The administration system (internal-facing interface) of the system and mobile app only needs to be in English. The working materials and test versions will be delivered in English and the translated versions will be added once IUCN has approved the final English version.

English will be the working language during the consultation meetings and email exchanges. Management of content in English, French and Spanish will be the responsibility of IUCN.

The supplier is kindly asked to specify if the front-end can also be available in Arabic.

#### **3. Integrations**

3.1. The virtual event platform should integrate with various systems and retrieve and send the data from and to the IUCN's CRM, the registration system, the exhibition management system and the Congress website. The registration and exhibition management systems will be managed by a PCO. The Congress website is custom developed. Please see 'Attachment 3: Congress processes' for an illustration of the connection of systems.

Should your system allow for a website that could be customisable, we invite you to bid for the Congress website RFP that you can find here: [Currently running tenders | IUCN](#)

3.2. Integration with registration system to retrieve and update:

- 3.2.1. Profiles of all Congress speakers
- 3.2.2. Relations of session organisers to sessions
- 3.2.3. Relations of Congress speakers to sessions
- 3.2.4. List of exhibitors
- 3.2.5. List of participants
- 3.2.6. User profiles of participants
- 3.2.7. Registration category
- 3.2.8. Tags, for examples if they attend virtually or on-site, sub-categories for access rights, etc

3.3. Programme display page linked with Congress website that shows:

- 3.3.1. Full Programme/List of all events (public and private)
- 3.3.2. List of session organisers and type
- 3.3.3. Exhibitors and exhibitors' events

3.4. Registration data synchronisation should take place every 5-10 minutes and only updated or new data since the last synchronisation should be transferred.

3.5. Enable Single Sign on using IUCN's OAuth server

3.6. IUCN's CRM is based on CiviCRM 5.57.4.

#### **4. GDPR compliance**

All processing, storing and use of personal data through the platform and its interfaces with other systems must be in full compliance with GDPR and the IUCN privacy policy. In addition, a data processing agreement will need to be signed.

#### **5. Security**

The virtual platform should be designed to high security standards to avoid being compromised, data being stolen, content being changed without approval, etc. Please describe all measures that are in place to guarantee data security and to protect against cyber-attacks.

Amongst the main points, the following should be covered:

- 5.1. Source code security: Obfuscation and industry-standard techniques should be setup to prevent attackers from understanding or reverse-engineering it.
- 5.2. Files and database security: If data resides on the device, it should be encrypted to prevent leakage.
- 5.3. Secure communications: Data should be properly secured when in transit, industry-standard encryption should be used to prevent packet-sniffing and man-in-the-middle threats. User logins /user profiles/user tokens should be secured and comply with GDPR regulations.
- 5.4. Server-side security: Server part of the application should be protected against all common threats like DDOS attacks, site hijacking, FTP access, data thefts, unapproved postings, etc.
- 5.5. Application validation: Ensuring that data input is validated to prevent malformed data.

#### **6. Response to failures**

The supplier is requested to provide information regarding the response time it will have in case of system failures. Please include example cases.

#### **7. Data handling**

Ability to manage large amount of data with no disruption of the platform performance based on the following indicative numbers for Congress (the actual numbers will be determined based on final programme as well as registration numbers and exhibition sales):

- Potential users: Around 2000 online and 8000 onsite participants
- Sessions: 600 (25 sessions rooms in parallel)
- Exhibitors: 100
- Speakers: 1000-2000
- Sponsors: 20

## **8. Technical support**

- 8.1. Configuration and set-up
- 8.2. Hosting and standard maintenance (upgrades, system compatibility)
- 8.3. Training for IUCN staff (one user training for IUCN staff that is sufficient to provide staff with necessary technical understanding on how to use back-end (training can be done online)
- 8.4. Onsite support to assist participants with questions about the platform and mobile app.

## **9. Reports**

Provide reports on user behaviour, session views, clicks per page, log ins, etc.

## **10. Sponsor advertisement**

Option to put sponsor banners on different pages of the platform.

## **11. Emails**

Functionality to send emails through the system to different lists of registered participants, speakers, session organisers, etc.

## **12. Restricted access**

Option to restrict access to certain pages on the platform depending on registrant category (e.g. paid vs non-paid participants, Media dedicated space, Speakers dedicated space, etc.

## **13. Code of conduct**

Participants need to agree to the IUCN code of conduct before being able to access the platform.

## **14. Hardware and software requirements**

- 14.1. Please provide all necessary information to describe the technical infrastructure that will host / support the virtual platform.
- 14.2. Provide a description of the video player that will be used to play all videos and the identified limitations (browser limitations, ability to avoid download of content, etc.)
- 14.3. Provide possible backup solutions in case security restrictions apply for individual companies (e.g., not using Zoom, plugins, etc.)

## **15. Access to backend**

- 15.1. IUCN staff and selected third parties need to have access to the backend as described below:
  - 15.1.1. Check and update session details.
  - 15.1.2. Add new sessions, presentations, speakers.
  - 15.1.3. Check the consent form status and change if needed.
  - 15.1.4. Update the video on demand library.
  - 15.1.5. Access to the exhibition page
  - 15.1.6. Access to online reports and statistics (e.g., missing consent forms, conflict of interest statements, missing ppts or recordings, etc.)
  - 15.1.7. Upload presentation or pre-recorded videos

## **16. Virtual platform features**



The list of features that the virtual platform should have, is organised in three main sections: information features, interactivity features and admin interface/back-end.

## 16.1. Information features

### 16.1.1. Session streaming

- 16.1.1.1. Streaming of recorded or live sessions
- 16.1.1.2. Connection to local Streaming/AV provider
  - 16.1.1.2.1. Please add to the proposal and quote, if your services can also include being the onsite streaming provider.
- 16.1.1.3. AI closed captioning
- 16.1.1.4. Possibility to integrate interpretation tool
- 16.1.1.5. Option for virtual speakers to join the session
- 16.1.1.6. Hosting of interactive virtual sessions. Please provide information on the maximum number of participants.
  - 16.1.1.6.1. Green room functionality
  - 16.1.1.6.2. Speaker and moderator roles
  - 16.1.1.6.3. Breakout room functionality

### 16.1.2. On demand video library

- 16.1.2.1. Possibility to trim on demand video on platform
- 16.1.2.2. Session recording available immediately after the stream has ended.
- 16.1.2.3. Storage size that can store all on demand sessions for 3 months.
- 16.1.2.4. Search and filtering function to look for videos by keywords, speakers, title etc.
- 16.1.2.5. Option to sort them ourselves.
- 16.1.2.6. Video editing if needed

### 16.1.3. Programme

- 16.1.3.1. Display list of all scheduled sessions by day and category (e.g., theme, session type, keyword, format, location)
- 16.1.3.2. Link to session details showing speakers (link to speakers and their profiles) and location (link to Interactive Map) agenda.
- 16.1.3.3. Link to presentations or downloadable documents.
- 16.1.3.4. Option to search all sessions by keywords or title as well as dates, session format, type etc.
- 16.1.3.5. Option to view list of sessions currently in progress and events commencing within the next time slot.
- 16.1.3.6. Possibility to display private meetings only to certain participants or groups of participants.
- 16.1.3.7. Possibility to stream multiple sessions at the same time. Please provide cloud/server infrastructure and capacity to handle it.
- 16.1.3.8. Provide information on session organiser and form to send him a message.
- 16.1.3.9. Programme display page that will be linked with Congress website to be visible to website visitors.

### 16.1.4. My Programme

- 16.1.4.1. Ability for participants to create their own personal programme by adding a session to My Programme including.
  - 16.1.4.1.1. Add a session to My Programme from the Official Programme.
  - 16.1.4.1.2. Possibility for admin to add sessions to My Programme of individual participants or group of participants (if possible, including adding private meetings).
  - 16.1.4.1.3. Option to add session to personal calendar.
  - 16.1.4.1.4. Option to sign up for sessions (e.g., training sessions) and waitlist option.

### 16.1.5. Speakers

View and search list of speakers by category and show when and where speakers are speaking (link to Programme and My Programme) as well as showing their speaker profiles.

### 16.1.6. Activity Feed

Latest updates from the Programme, social media, announcements into a single information feed.

- 16.1.7. Practical Info  
Practical information about Congress, services, transportation, etc. in a customisable menu.
- 16.1.8. My Profile  
Import registration information from registration system and allow participants to customise their profile, change photo, areas of interest, turn messaging on/off, choose language preference and email and phone privacy settings.
- 16.1.9. Virtual exhibition
  - 16.1.9.1. Group the exhibitors into defined categories and enable users to search exhibitors by category or basic search; exhibitor profile page includes link to additional information as well as location on Interactive map.
  - 16.1.9.2. Lead capture through virtual platform and mobile app
  - 16.1.9.3. Exhibitors should have access to their own exhibitor page to update information, upload documents and see live page statistics.
- 16.1.10. Push messaging  
Broadcasting and scheduling of messages to participants or group of participants (i.e. online vs onsite participants).
- 16.2. Interactivity features
  - 16.2.1. Networking / Messaging / Match Making  
Possibility to search for and contact other participants with same area of expertise/interests via in-app and by email notification.
    - 16.2.1.1. Only enabled for participants who enabled this feature in their profile.
  - 16.2.2. Live Questions and Answers  
Possibility for the onsite and online participants to send questions through the platform to the speakers and moderators of the sessions. Display the questions next to the stream so that all the participants can see them. If possible, participants can vote for the most liked question so that this question appears on the top of the list. Display the questions that will be answered by the speakers on the main screen. If needed, also the possibility to use a tool to moderate which questions should be displayed in the app.
  - 16.2.3. Session polling: Possibility to run polls through app to allow session organisers/speakers to ask questions to their audience to which participants sitting in the session or connected online can reply on platform and results can be displayed on the screen in real time. Wordclouds or other forms of interaction options during the sessions are welcomed.
  - 16.2.4. Session chat accessible through mobile app and virtual platform.
  - 16.2.5. Social Media  
*Nice to have feature*  
Link to event-specific, Facebook, YouTube pages including link to Website. API to show all relevant tweets with Congress hashtag.
  - 16.2.6. Session feedback  
Standardised survey for specific sessions to allow audience to give feedback (multiple choice or open text).
- 16.3. Admin interface/back-end  
User-friendly administration module/back-end (English only) allowing customising content in three languages, export and import data, programming and scheduling of push-messages, etc. Possibility to add edit landmarks on interactive maps and directly modify the content if needed.
- 16.4. Additional features  
IUCN recognises that the above list does not cover the full spectrum of possible features and IUCN welcomes any additional ideas from Proposers that could enhance and improve the user experience.

## Part 2: Mobile app

IUCN wishes to provide its Congress onsite participants but also the ones connected online with a mobile app that allows them to navigate the Congress quickly and to have a swift user experience. The mobile app will be a key element in the communication with the Congress participants as IUCN aims to hold a paperless event and fast and smooth communication via the app is thus critical.

The app needs to be ready if possible six weeks before the Congress starts and remain available 3 months after the Congress.

The requirements for the mobile app for this procurement are as follows:

### 17. Integrations

17.1. The mobile app should integrate with various systems and retrieve the data from the virtual event platform.

- 17.1.1. Full Programme/List of all events (public and private)
- 17.1.2. List of session organisers
- 17.1.3. Profiles of all Congress speakers
- 17.1.4. Relations of session organisers to sessions
- 17.1.5. Relations of Congress speakers to sessions
- 17.1.6. List of exhibitors and participants
- 17.1.7. User profiles of participants
- 17.1.8. Registration category
- 17.1.9. Tags, for example if they attend virtually or on-site.
- 17.1.10. IUCN Document management system
- 17.1.11. Congress webpages (News, Social Media, Logistics, etc)

17.2. Login information for user authentication

### 18. Security

The mobile application should be designed to high security standards to avoid being compromised, data being stolen, content being changed without approval, etc. Amongst the main points, the following should be covered:

- 18.2. Source code security: Obfuscation and industry-standard techniques should be setup to prevent attackers from understanding or reverse-engineering it.
- 18.3. Files and database security: If data resides on the device, it should be encrypted to prevent leakage.
- 18.4. Secure communications: Data should be properly secured when in transit, industry-standard encryption should be used to prevent packet-sniffing and man-in-the-middle threats. User logins /user profiles/user tokens should be secured and comply with GDPR regulations.
- 18.5. Server side security: Server part of the application should be protected against all common threats like DDOS attacks, site hijacking, FTP access, data thefts, unapproved postings, etc.
- 18.6. Application validation: Ensuring that data input is validated to prevent malformed data

### 19. Languages

The public interface of the mobile app and related systems has to be delivered in English, French and Spanish. The supplier is requested to mention if the mobile App can also be delivered in Arabic.

IUCN will provide the necessary translations that the Contractor will add to the site. The administration system (internal-facing interface) of the mobile app only needs to be in English.

The working materials and test versions will be delivered in English and the translated versions will be added once IUCN has approved the final English version. English will be the working language during the consultation meetings and email exchanges. Management of content in English, French and Spanish will be the responsibility of IUCN.

### 20. Data handling

Ability to manage large amount of data with no disruption of the app performance onsite (fast content loads) based on the following indicative numbers (the actual numbers will be determined based on final programme as well as registration numbers and exhibition sales):

- Potential Users: Around 2000 online and 8000 onsite participants
- Sessions: 600 (25 sessions rooms in parallel)
- Exhibitors: 100
- Speakers: 1000-2000
- Sponsors: 20 (splash page: 2)

## 21. Operating system

21.2. Native app compatible with on Apple iOS (minimum requirement is on iPhone 6 and iOS12 and up) as well as Android based systems (minimum requirements 5.0 and up).

21.3. Web based solution for users without smartphones (information should be provided about the bandwidth requirements onsite in order not to overload the onsite Wi-Fi).

## 22. Sponsors advertisement

Sponsor logo display on splash page (allowing for two sponsor logos in addition to Congress logo) as well as an in-app sponsor list and/or top/side/bottoms banners with logos and link to contact info. Any other suggestions on how the mobile app can provide sponsor visibility to generate revenue is welcome.

## 23. Reports

Provide app analytics showing the use of different features and history of connection.

## 24. Technical support

24.2. Configuration and set-up

24.3. Publication of the app in the Apple Store and Google Play Store

24.4. Hosting of the app and standard maintenance (upgrades, system compatibility)

24.5. Training for IUCN staff (one user training for IUCN staff that is sufficient to provide staff with necessary technical understanding on how to use back end (training can be done online)

## 25. Mobile app features

The list of features that the mobile app should have, is organised in three main sections: information features, interactivity features and admin interface/back-end.

25.2. Information features

25.2.1. Programme

25.2.1.1. Display list of all scheduled sessions by day and category (e.g., theme, session type, keyword, Format, location)

25.2.1.2. Link to session details showing speakers (link to speakers and their profiles) and location (link to Interactive Map) agenda plus link to further details on external Congress website.

25.2.1.3. Option to search all sessions by keywords, title, session format, type as well as dates.

25.2.1.4. Option to view list of sessions currently in progress and events commencing within the next time slot.

25.2.1.5. Possibility to display private meetings only to certain participants or groups of participants.

25.2.2. My Programme

25.2.2.1. Ability to create own personal programme by adding a session to My Programme including.

25.2.2.1.1. Add a session to My programme from the Official Programme

25.2.2.1.2. Possibility for admin to add sessions to My Programme of individual participants or group of participants (if possible, including adding private meetings).

25.2.2.1.3. Option to add session to personal calendar.

### 25.2.3. Speakers

View and search list of speakers by category and show when and where speakers are speaking (link to Programme and My Programme)

### 25.2.4. Interactive map

*Nice to have feature*

Option to pinpoint locations of exhibitors, session rooms and other key points of interest on a venue floor plan to allow users to search for them and navigate venue (estimated landmarks for 2025: 250-300); no GPS location/beacon technology needed.

### 25.2.5. Activity Feed

Latest updates from the Programme, social media, announcements into a single information feed.

### 25.2.6. Practical Info

Practical information about Congress, services, transportation, etc. in a customisable menu.

### 25.2.7. My Profile

Import profiles from virtual event platform and allow participants to customise their profile, change photo, turn messaging on/off, choose language preference and email and phone privacy settings.

### 25.2.8. Push messaging

Broadcasting and scheduling of messages to participants or groups of participants.

### 25.2.9. Exhibitors

25.2.9.1. Groups the exhibitors into defined categories and enables users to search exhibitors by category or basic search; exhibitor profile page includes link to additional information as well as location on Interactive map.

25.2.9.2. Lead capture

## 25.3. Interactivity features

### 25.3.1. Networking / Messaging / Match Making

Possibility to search for and contact other participants with same area of expertise/interests via email or in-app.

25.3.1.1. Only enabled for participants who enabled this feature in their profile.

### 25.3.2. Live Questions and Answers

Possibility for the onsite and online participants to send questions through the app to the speakers and moderators of the sessions. Display the questions in the app so that all the participants can see them. If possible, participants can vote for the most liked question so that this question appears on the top of the list. Display the questions that will be answered by the speakers on the main screen. If needed, also the possibility to use a tool to moderate which questions should be displayed in the app.

25.3.3. Session polling: Possibility to run polls through app to allow session organisers/speakers to ask questions to their audience to which participants sitting in the session or connected online can reply on platform and results can be displayed on the screen in real time. Wordclouds or other forms of interaction options during the sessions are welcomed.

### 25.3.4. Social Media

*Nice to have feature*

Link to event-specific X, Facebook, YouTube pages including link to X. API to show all relevant tweets with Congress hashtag.

### 25.3.5. Session feedback

Standardised survey for specific sessions to allow audience to give feedback (multiple choice or open text).

25.3.6. Scanning of participant profiles to exchange contact details.

#### 25.4. Admin interface / back-end

User-friendly administration module/back-end (English only) allowing customising content in three languages, export and import data, programming and scheduling of push-messages, etc. Possibility to add edit landmarks on interactive maps and directly modify the content if needed.

#### 25.5. Additional features

IUCN recognises that the above list does not cover the full spectrum of possible features and IUCN welcomes any additional ideas from Proposers that could enhance and improve the user experience.

### Part 3: Programme management system

The scope of services and responsibilities for the provider desired for this procurement are as follows:

#### 1. Session management system

##### 1.1. System Initialisation and Language Support

1.1.1. Commencement timeline: The system should be operational as early as June 2024, offering a session management platform for specific users (externals and IUCN staff) with diverse access roles.

1.1.2. Multilingual interface: the user back-office operates in English, while the front-office, including forms, speaker profiles, session submission, etc., supports the three official languages: English, Spanish and French. The supplier is requested to confirm if Arabic can be accommodated in the front-end interface.

##### 1.2. Call for Session / Session submission

1.2.1. Submission expectation: Approximately 1500 session submissions are anticipated, with an approval target of 200 sessions.

1.2.2. Customisable submission form: provide a fully customizable form for session submissions with general fields such as Title, description, potential speakers, subject, partners, etc.

1.2.3. Single Sign-On integration: Implement a single sign-on feature, connecting the system to IUCN OAuth for seamless user authentication and avoiding duplication.

1.2.4. Draft management and email notifications: Enable session organisers to save their proposals as drafts, allowing multiple edits before final submission. The system should send email reminders to organisers nearing the deadline if the session remains in draft status.

1.2.5. Multiple session submissions: Provide the capability for session organizers to submit multiple sessions, facilitating a streamlined submission process.

##### 1.3. Reviewing process

1.3.1. Allow for a comprehensive three-step reviewing process.

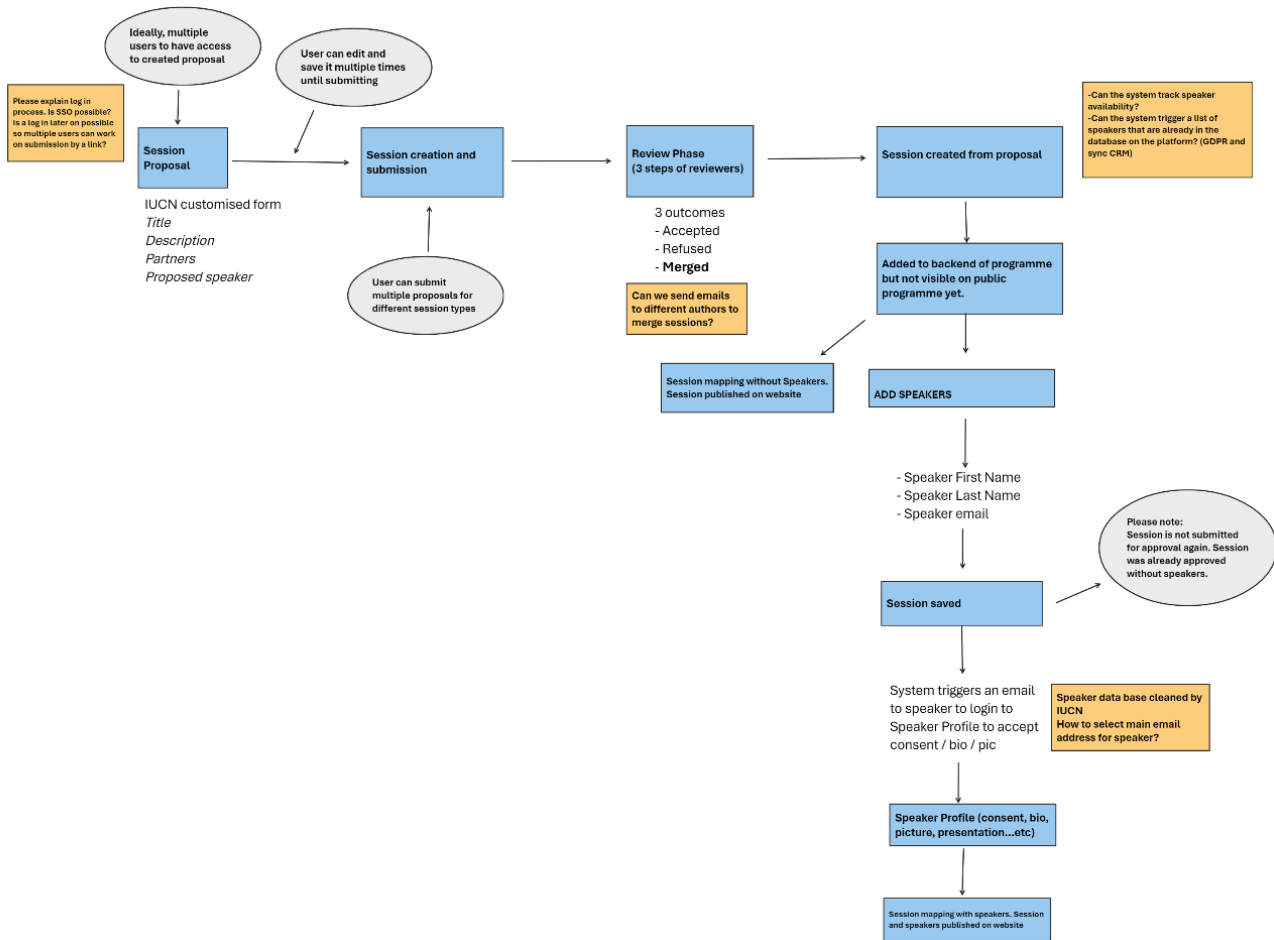
1.3.2. Internal review process by the Forum team: The Forum team initiates an internal review process

1.3.3. Import and invitation of external reviewers: external reviewers are invited through the system with an invitation email including login and password for example.

1.3.4. Automatic allocation of sessions: sessions are automatically assigned to reviewers based on session type, areas of expertise, theme areas, topics, regions, languages etc. The number of proposals assigned to each reviewer will be limited (limit to be defined). The Forum team approves these assigned reviewers. The Forum team should also be able to manually assign reviewers.

1.3.5. Reviewers Evaluation: reviewers evaluate session proposals, rating them based on predefined questions set by the Forum team. In case of conflict of interest, proposals are returned to general pool for reassignment to another reviewer.

- 1.3.6. IUCN selection committee Review: an internal IUCN selection committee is established. The committee has access to session proposals and reviews both internal and external reviewer assessments.
  - 1.3.7. Anonymity requirement: session proposals remain anonymous during external review and the IUCN selection committee's evaluation, displaying only the proposal ID without contact details.
  - 1.3.8. Validation: The Forum team consolidates reviews from external reviewers and IUCN selection committee, conducting an internal check to create the final list of approved sessions. Sessions may be approved as submitted, approved as a different session type, approved as merged sessions and rejected. Therefore, the system should allow the Forum team to change session types and to merge multiple sessions in one session.
  - 1.3.9. Email Notification: the system should trigger emails updating session organisers on the status of their proposals
  - 1.3.10. Proposal acceptance: accepted proposals are converted into 'sessions' within the system. These sessions are not immediately visible on the official Forum program: the Forum team decides when to make them public. Ideally, the system automatically converts proposals into session pages, transferring most field values. Customization options are available for IUCN, and the Forum team determines which fields are carried over from the outset.
- 1.4. Session management
- 1.4.1. The system allows session organisers to edit certain sections of accepted proposals. Ideally the system would allow multiple organiser per session.
  - 1.4.2. Speaker addition and confirmation: upon approval of the session proposal, the session submitter receives an email prompting them to add speakers.
  - 1.4.3. Database search and prevention of duplicates: when adding speakers by entering last name, first name and email address (country tbc), the system conducts a search in the platform's database or IUCN's CRM to identify existing speaker profiles preventing double entries. Multiple email addresses per speaker can be entered, with the option to select a main email address for communication.
  - 1.4.4. Speaker confirmation process: ideally speakers log in with their IUCN account. The speaker can accept or reject the invitation, update their profile, and confirm consent through checkboxes. Once these steps are completed, the speaker is integrated in the programme.
  - 1.4.5. Room assignment and preliminary website publication: the session, even without finalised speaker profiles, can be assigned to a room and published on the website once the session organiser updates the title and brief description of the session (if required)
  - 1.4.6. Full session publication after speaker information update: following the provision of additional information by speakers, the session, along with updated speaker details, is fully published on the programme.



## 2. Presentation management system and Speaker Preview

### 2.1. Presentation upload

2.1.1. The Congress is planned as a hybrid event. Sessions can be fully virtual, fully in-person or hybrid. The moderator is always onsite as well as several speakers. It's possible that some speakers join remotely. All speakers should upload their presentation and materials (incl. self-recordings) in advance of the conference on the virtual platform. The in-person presentation support centre should allow for last minute uploads only.

2.1.2. Speakers shall be able to:

- 2.1.2.1. Upload their presentation and/or material
- 2.1.2.2. Preview their presentation and/or material
- 2.1.2.3. Edit their presentation and/or material
- 2.1.2.4. Change their presentation and the presentation title. In case of a presentation title change, the change needs to be displayed in the reception interface, the session outlines. in the conference session rooms, on the presentation computers, on the virtual platform and the session room screens.
- 2.1.2.5. Delete their presentation file
- 2.1.2.6. Upload stand-alone video files
- 2.1.2.7. Give or reject consent for presentation and recording upload on the Congress website
- 2.1.2.8. Submit their conflict of interest disclosure and edit it if needed.



- 2.1.3. It is the supplier's responsibility to ensure quality assurance and that the presentation recording is ready and displaying correctly before it is set to be released or broadcast. Recordings should be integrated in a specific format and design (following Congress visual identity and branding guidelines)
- 2.1.4. If there are two or more speakers with presentations or materials under the same presentation title, one slot per speaker needs to be created in order to be able to upload the individual presentation or material. Each speaker should be asked about consent to sharing the presentation or material and the recording ahead of the event.
- 2.1.5. IUCN shall also be able to upload slide loops per session (to be displayed before the sessions start) and shall have empty slots for each session where additional files can be uploaded by IUCN (e.g., disruption slide, etc.).
- 2.1.6. The uploaded presentations and materials shall be stored on a shared drive on supplier's server. A file copy system (file synchronization) shall be set up to copy the presentations, PDFs, materials and other files onto the IUCN server (if required).
- 2.1.7. Supplier shall provide a server (main and backup server) in-person in the Presentation Support as part of the Services.
- 2.1.8. The presentation upload computers in the Presentation Support and in the session rooms as well as any other equipment required by the supplier to provide the Services are provided either by the supplier or by IUCN (tbc).
- 2.1.9. As part of your proposal, please describe:
  - 2.1.9.1. How your software works, what your standard processes are and to what extent it can be customized.
  - 2.1.9.2. How the uploading system (uploading ppts, self-recorded content, etc.) works. Please also include details on how the reminder process for missing uploads (presentation, recording, etc.) and other actions (e.g., consent form, search for duplicates and profile merge, etc.) works.

## 2.2. In-person presentation support

The in-person presentation support (Presentation support) is intended to support all speakers, presenters, chairpersons and moderators that will present in the session rooms. Check-in at the presentation support is only for last minute changes and in-person support. As it will not be possible to upload presentations directly from the presentation computer in the session rooms, all presentations must be uploaded on the virtual platform beforehand (or in the presentation support if needed).

For the in-person presentation support and the session rooms, the presentation upload computers can either be provided by the supplier or by the Congress IT. An IP network for the presentation and video distribution that connects the presentation support to the conference session rooms should be set up by using the existing venue network as much as possible.

In the in-person presentation support room, the supplier assists with:

- 2.2.1. Small edits to names and presentation titles
- 2.2.2. For conference session speakers and session organisers, changing the consent form choice as well as the conflict-of-interest form at all times (before and after the presentation takes place)
- 2.2.3. Generate an Online Programme presentation opt-out document (with session, presentation and speaker details) for those speakers that don't wish to have their presentation available online, based on a template to be provided by IUCN.
- 2.2.4. Generate an Online Programme recording opt-out document (with session, presentation and speaker details) for those speakers that don't wish to have the recording of their presentation available online, based on a template to be provided by IUCN.

2.2.5. Provide a script that provides the session outline for each session, including the following information:

- 2.2.5.1. Session number
- 2.2.5.2. Date and time of generation of outline
- 2.2.5.3. Session code
- 2.2.5.4. Session day, time and room
- 2.2.5.5. Presentation type (virtual only, onsite only, hybrid)
- 2.2.5.6. Presentation material (ppt yes/no, recording yes/no)
- 2.2.5.7. Empty field for additional info (security information, for example)
- 2.2.5.8. Chairperson(s)/Moderators first name, last name and country
- 2.2.5.9. Presentation(s) code, start time and title
- 2.2.5.10. Speaker(s) first name, last name, country and biography
- 2.2.5.11. Speaker presentation status (joining virtually or in-person)
- 2.2.5.12. Consent form choices (regardless of having material or not attached)
- 2.2.5.13. Missing presentations (if applicable)

2.2.6. Supplier shall make these session outlines available to the AV technicians and hosts/hostesses in the session rooms (ideally shared drive where the session outlines can be accessed and downloaded by the AV supplier and the AV technicians in the session rooms as required).

2.2.7. As part of your proposal please describe presentation support and on-site management, indicate how many staff members will be required on-site to staff the presentation support and to manage the presentation distribution and streaming, in the session rooms and virtually, and their daily rates.

### 2.3. Presentation and material distribution

2.3.1. At the scheduled time, all uploaded presentations and materials shall be distributed to the respective channel on the virtual platform and to the respective conference session rooms in the venue via the venue network. In each conference session room, a computer is provided at the lectern.

2.3.2. As soon as a speaker either clicks on the presentation title or the speakers name, the presentation should open and be displayed on the computer and on the session room screen.

## 3. Room management system

3.1. Commencing as early as November, 2024, provide a room management system for specific users (Forum team, exhibitors and private meeting room bookings) in the three official languages, English, Spanish and French.

3.2. Provide a room management system so user can book rooms

3.2.1. Fields include: Date, Room, Days, Session type, Session keywords, Search, Calendar view

3.2.1.1. In the calendar the user should be able to double-click an empty time slot allowing to either create a new session at this date, time and room or to select an existing session which is not yet scheduled. Double booking is not allowed by the system.

3.2.2. Provide option for user to schedule existing session or new session for a room. Mass session upload and automated scheduling should be possible.

3.2.2.1. Existing session is to be selected from dropdown menu (only approved sessions)

3.2.2.2. New session can be created by entering the new session title, new session type, new session description and length of session.

3.2.3. Provide admin option to add rooms including fields: Name, Capacity, Room category, Description, Location, Set up, Interpretation booths, Screen, Projector, Notes

3.3. Provide overview of rooms as agenda view

3.4. Double bookings are not allowed and break time of 30 minutes or 45 minutes for sessions at exhibition stands between sessions should be considered.

3.5. Session drag and drop functionality.

#### 4. **Speaker management system**

- 4.1. Provide speaker dashboard.
- 4.2. Allow multiple email addresses per speaker and option to determine main email address.
- 4.3. Assign tasks for speakers and add deadlines.
- 4.4. Provide custom portal per speaker type to show different task depending on role.
- 4.5. Send email notification for outstanding tasks.
- 4.6. Add fields, for example, if speaker attends in-person or virtual.
- 4.7. Complete and submit consent form as well as conflict of interest form for sessions.
- 4.8. Upload of presentations, recordings and other documents.

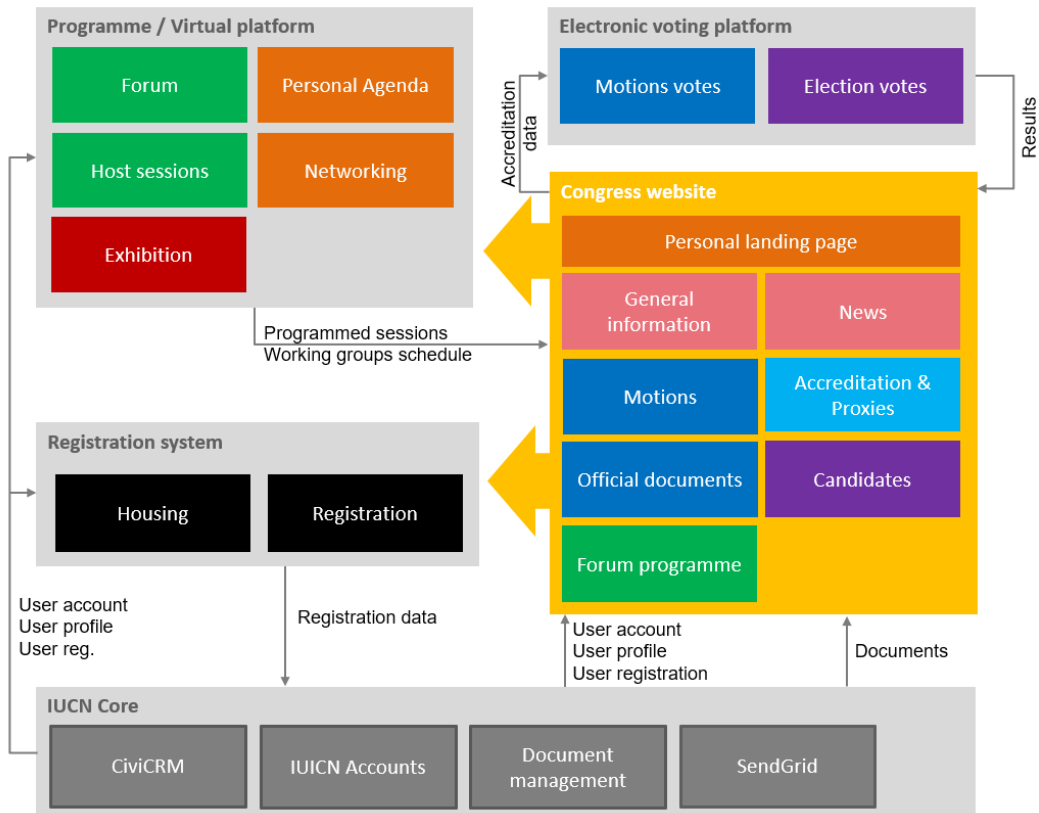
Attachment 3: Congress processes

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**1. Congress processes**

The illustration shows the Congress processes and connection of systems.



Attachment 4: Example IUCN API  
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All integrations are done exposing and consuming webservices. The selected contractor will be responsible for building the webservices and scripts on their systems. IUCN will be responsible to ensure the availability of the required web services and scripts on other Congress systems and will provide the required webservice details as in the example below.

### CiviCRM - Get Members

```
URL: https://civicrm.iucn.org/civicrm/
POST /civicrm/iucnapi HTTP/1.1
Authorization: Bearer
X-Civi-Auth:
Content-Length: 132
Content-Type: application/json
Host: civicrm.iucn.org
{
  "source": "corporate_",
  "action": "get_members",
  "params":{
    "limit":0,
    "offset":0,
    "id":0
  }
}
```

### Response example

```
1 - {
2 -   "data": [
3 -     {
4 -       "OrgName": "Department of Biodiversity, Conservation and Attractions",
5 -       "OrgAcronym": "",
6 -       "url": "",
7 -       "MemberCategory": "Government Agency with State Member",
8 -       "MemberCategoryFr": "Government Agency with State Member",
9 -       "MemberCategoryIt": "Government Agency with State Member",
10 -      "StatutoryState": "Australia",
11 -      "StatutoryStateFr": "Australia",
12 -      "StatutoryStateIt": "Australia",
13 -      "StatutoryRegion": "Oceania",
14 -      "StatutoryRegionFr": "Oceania",
15 -      "StatutoryRegionIt": "Oceania",
16 -      "OperationalRegion": "Oceania",
17 -      "CountryCode": "AU",
18 -      "OrgCivild": "43617",
19 -      "MemberId": "3",
20 -      "MemberSince": "1954-01-01",
21 -      "Description": "",
22 -      "Logo": "",
23 -      "Profileurl": "https://portals.iucn.org/union/details/VorgV",
24 -    }
25 -  ]
}
```

Attachment 5: Minimum qualifications

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Minimum qualifications for consideration of proposals are as follows:

1. Candidate must provide IUCN with three (3) relevant references of clients like IUCN and that IUCN may contact regarding the Candidate's qualifications, reputation, reliability, or experience of its key personnel.
2. Candidate to confirm and provide relevant proof of having all the necessary legal registrations to perform the work.
3. Candidate to confirm and provide relevant proof of being in business for at least three (3) years.
4. Candidate to provide annual turnover for each of the past three (3) years.
5. Candidate to confirm how many of his/her employees are qualified for this work and the team who will be dedicated to the contract resulting from this RfP?
6. Candidate to confirm that the organisation has formal policies and procedures to safeguard General Data Protection Regulations.
7. Candidate to confirm and provide proof of having formal policies and/or procedures for the following: code of conduct, sustainability, gender mainstream, carbon offset, anti-fraud, etc.
8. Confirmation that required systems are developed in-house or already integrated with sub-systems, customisations are possible and timeline including potential customisations can be met.

Attachment 6: Declaration of Undertaking

RFP No. **IUCN-23-11-P04213-002**

Issued 27 November 2023

**DECLARATION OF UNDERTAKING in relation to RfP virtual platform and project management system**

I, the undersigned, hereby confirm that I am an authorised representative of the following organisation:

Registered Name of Organisation (the "Organisation"): \_\_\_\_\_

Registered Address (incl. country): \_\_\_\_\_

Year of Registration: \_\_\_\_\_

I hereby authorise IUCN to store and use the information included in the attached Proposal for the purpose of evaluating Proposals and selecting the Proposal IUCN deems the most favourable. I acknowledge that IUCN is required to retain the Proposal in its entirety for 10 years after the end of the resulting contract and make this available to internal and external auditors and donors as and when reasonably requested.

Where the Proposal includes Personal Data as defined by the European Union's General Data Protection Regulation (GDPR), I confirm that the Organisation has been authorised by each Data Subject to share this Data with IUCN for the purposes stated above.

I further confirm that the following statements are correct:

1. The Organisation is duly registered in accordance with all applicable laws.
2. The Organisation is fully compliant with all its tax and social security obligations.
3. The Organisation and its staff and representatives are free of any real or perceived conflicts of interest with regards to IUCN and its Mission.
4. The Organisation agrees to declare to IUCN any real or perceived emerging conflicts of interests it or any of its staff and representatives may have concerning IUCN. The Organisation acknowledges that IUCN may terminate any contracts with the Organisation that would, in IUCN sole discretion, be negatively affected by such conflicts of interests.
5. None of the Organisation's staff has ever been convicted of grave professional misconduct or any other offence concerning their professional conduct.
6. Neither the Organisation nor any of its staff and representatives have ever been convicted of fraud, corruption, money laundering, supporting terrorism or involvement in a criminal organisation.
7. The Organisation acknowledges that engagement by itself or any of its staff in fraud, corruption, money laundering, supporting terrorism or involvement in a criminal organisation will entitle IUCN to terminate any and all contracts with the Organisation with immediate effect.
8. The Organisation is a going concern and is not bankrupt or being wound up, is not having its affairs administered by the courts, has not suspended business activities, is not the subject of proceedings concerning those matters, or in any analogous situation arising from a similar procedure provided for in national legislation or regulations.
9. The Organisation complies with all applicable environmental regulatory requirements or other legal requirements relating to sustainability and environmental protection.
10. The Organisation is not included in the UN Security Council Sanctions List, EU Sanctions Map, US Office of Foreign Assets Control Sanctions List, or the World Bank listing of ineligible firms and individuals. The Organisation agrees that it will not provide direct or indirect support to firms and individuals included in these lists.
11. The Organisation has not been, is not, and will not be involved or implicated in any violations of Indigenous Peoples' rights, or injustice or abuse of human rights related to other groups or individuals, including forced evictions, violation of fundamental rights of workers as defined by the International Labour Organization's (ILO) Declaration on the Fundamental Principles and Rights at Work, child labour, sexual exploitation, sexual abuse, or sexual harassment.

---

<Date and Signature of authorised representative of the Proposer>

< Name and position of authorised representative of the Proposer >





Attachment 7: Contract template

RFP No. **IUCN-23-11-P04213-002**

Issued 27 November 2023

**TEMPLATE CONSULTANCY AGREEMENT (for COMPANIES)**

<b>CONTRACT REFERENCE NUMBER</b>	
<b>PROJECT NUMBER</b>	
<b>AWARD NUMBER</b>	

**CONSULTANCY AGREEMENT**  
(the “**Agreement**”)

**between**

**IUCN, International Union for Conservation of Nature and Natural Resources**, an international association established under the laws of Switzerland, with its World Headquarters located at Rue Mauverney 28, 1196 Gland, Switzerland (hereafter “**IUCN**”),

**and**

[full legal name of other party], [type of company] established under the laws of [name of country], with headquarters located at [address], [country] (hereafter “**Consultant**”)

IUCN and the Consultant shall be referred to herein individually as a “Party” and together as the “Parties”.

**PREAMBLE**

**Whereas** the mission of IUCN is to influence, encourage and assist societies throughout the world to conserve the integrity and diversity of nature and to ensure that any use of natural resources is equitable and ecologically sustainable;

[OPTION 1] **Whereas** IUCN has received a donation from [name of the Donor] (hereafter the “Donor”) to implement the Project [insert the name] (the “Project”) and wishes to benefit from certain skills and abilities of the Consultant with the aim of providing IUCN with assistance and support in [describe the activities for which support is expected from Consultant].

[OPTION 2] **Whereas** IUCN wishes to obtain advisory and consulting services from the Consultant [for XXX or in the area of XXX] and the Consultant agrees to assist IUCN with such services under the terms and the conditions set forth in this Agreement.

**Whereas** the Consultant has represented to IUCN that it has the required expertise and experience;

**Now therefore** the Parties agree as follows:

## 1. SERVICES

1.1 The Consultant will [short description of the services], perform the tasks and deliver the deliverables no later than the agreed deadline(s) as set out in the terms of reference attached as Annex I (the “Services”).

1.2 The Consultant will assign [name of the person(s) and title(s)] (the “Key Personnel”), who is/are(an) employee(s) of the Consultant, to the performance of the Services on behalf of the Consultant. The replacement of any Key Personnel must be approved in advance by IUCN in writing.

1.3 IUCN reserves the right to request any reports (progress, financial or otherwise additional to those required under the Agreement), which could be considered to be reasonably required to evidence satisfactory performance under the Agreement. All financial records and other relevant documents relevant to or pertaining to this Agreement may be subject to inspection and/or audit at the discretion of IUCN or of the Donor. The Consultant agrees to allow IUCN or Donor's auditor(s) access to such records during normal business hours and to allow interviews of any employees who might reasonably have information related to such records. In the event of inspection or audit, IUCN or Donor shall provide the Consultant reasonable prior written notice.

1.4 The Consultant shall not subcontract the Services to third parties without the prior written consent of IUCN. However, the Consultant may under its own responsibility use the services of others provided such services are of an auxiliary or clerical nature.

## 2. TERM

This Agreement comes into effect on [date] [or] [upon its signature by both Parties] (the “Effective Date”) and will expire on [date] (the “Expiration Date”).

## 3. INDEPENDENT STATUS

3.1 The employees, directors or shareholders of the Consultant shall not be entitled to any pension, bonus or other fringe benefits from IUCN.

3.2 The Consultant shall have no authority to enter into contracts or to incur any other legally binding commitment on behalf of IUCN.

3.3 No employee, director or other representative of the Consultant shall hold him or herself out or permit itself to be held out as having authority to do or say anything on behalf of or in the name of IUCN.

3.4 The Consultant shall be solely and exclusively liable for any and all taxes, levies or dues required to be paid in any of the countries where this Agreement applies, on any amounts paid to the Consultant by IUCN and has sole responsibility for declaring such amounts to the relevant tax authorities.

## 4. OBLIGATIONS

4.1 The Consultant shall carry out its duties in an expert and diligent manner and to the best of its ability and shall promptly and faithfully comply with all lawful and reasonable requests which may be made by the IUCN Contact Person.

4.2 The Consultant shall give written or oral advice or information regarding the execution of the Services as and when required by IUCN.

4.3 In the case of illness or accident or a case of Force Majeure as described under clause 16.3 preventing the Key Personnel from performing the Services, the Consultant shall promptly notify IUCN in writing of impediment.

## 5. REMUNERATION

5.1 As full remuneration for the Services performed under the terms of this Agreement, IUCN shall pay the Consultant a fixed and firm lump sum of [currency/amount in numbers (amount spelled out in letters)] (“the Remuneration”) based on [number of days] days of work at a daily rate of [daily rate] as follows:

5.1.1 A first instalment of [currency/amount in numbers (amount spelled out in letters)] corresponding to 30% of the Remuneration upon receipt of a signed copy of this Agreement together with a first invoice;

5.1.2 A second instalment of [currency/amount in numbers (amount spelled out in letters)] corresponding to 30% of the Remuneration [please indicate what task(s)/deliverable(s) will trigger payment] and presentation of the corresponding invoice; and

5.1.3 A third and last instalment of [currency/amount in numbers (amount spelled out in letters)] corresponding to remaining 40% of the Remuneration upon satisfactory and timely completion and IUCN written acceptance of all Services as specified in Annex I. The final invoice must be submitted no later than [insert the no. of days e.g. 30 days] after IUCN’s written acceptance of all Services or after the Agreement end date whichever is later.

5.2 The Consultant must submit a valid invoice quoting the Contract Reference Number and number of the instalment for each payment to be made.

5.3 If the tasks defined in the Agreement are not fulfilled to the satisfaction of IUCN within the requested time limit, IUCN reserves the right to withhold any further payments and recuperate any funds already paid for unfulfilled Services.

5.4 IUCN shall make payments to the Consultant’s bank account (to be opened in the name of the Consultant in the place where Consultant is established or where the Services are provided) as follows:

Complete Account name: [xxx]  
Account type and currency: [xxx]  
Bank name: [xxx]  
Bank address: [xxx]  
Account No.: [xxx]  
SWIFT Code or other bank routing code: [xxx]  
IBAN No: [xxx]

5.5 The Consultant shall bear bank charges for international wire-transfers (namely from the Consultant’s bank or any intermediary banks) associated with any transfer of funds that IUCN may make hereunder.

5.6 Funds that remain unused at the Expiration Date or termination date of this Agreement must be returned to IUCN within sixty (60) days following either of such dates, as applicable.

## 6. TRAVEL EXPENSES

6.1 Travel expenses in connection with this Agreement shall not exceed [currency/amount in numbers] [(currency and amount in words)]. All travel has to be approved in writing (email accepted) by the IUCN Contact Person before any reservation is made.

6.2 The IUCN Travel Policy and Procedures for Non-Staff shall apply to all travel expenses and is available at <https://www.iucn.org/corporate/finance/procurement/iucn-travel-policy>.

6.3 A financial report with receipts (e.g. transportation, accommodation, meals and incidentals) must be submitted in the currency of the Agreement to the IUCN Contact Person in order for reimbursement to be made.

## **7. CONSULTANT'S WARRANTIES AND UNDERTAKINGS**

7.1 The Consultant warrants that its performance of the Services under the terms of this Agreement will not infringe on the rights of any third party or cause the Consultant to be in breach of any obligation towards a third party.

7.2 The Consultant warrants that it has obtained the assignment of all Results and Intellectual Property rights pertaining to the Results from his employees (including without limitation the Key Personnel).

7.3 The Consultant shall maintain at its sole expense liability and any other relevant insurance covering the performance of this Agreement. IUCN may require the Consultant to provide a certificate of insurance evidencing such coverage.

7.4 The Consultant represents and warrants that no part of the Remuneration shall be provided to, or used to support, individuals and organizations associated with terrorism as identified on any sanction list published by the European Union, the United States Government, the United Nations Security Council or other relevant agency or body.

## **8. CONFIDENTIALITY**

8.1 The Consultant will not disclose or use, at any time during or subsequent to this Agreement, any confidential information of IUCN or any other non-public information relating to the business, financial, technical or other affairs of IUCN except as required by IUCN in connection with the Consultant's performance of this Agreement or as required by law. In particular, but without prejudice to the generality of the foregoing, the Consultant shall keep confidential all Intellectual Property and know-how disclosed to it by IUCN, which becomes known to it during the period of this Agreement or which it develops or helps to develop in providing the Services to IUCN.

8.2 The Consultant may communicate confidential information only to those of its employees who are directly and necessarily involved in the performance of this Agreement or who are bound to the Consultant by obligations no less stringent as the ones mentioned in this Agreement.

8.3 The Consultant shall:

8.3.1 not disclose to third parties (including news and social media) without express prior written consent of IUCN the contents of this Agreement and the results of work performed as part of the provision of the Services;

8.3.2 disclose know-how and other confidential information of IUCN which is provided by IUCN to the Consultant for the purpose of carrying out the Services only to those persons necessary to accomplish the Services and only to the extent necessary for the proper performances of the Services or to persons bound to the Consultant by obligations no less stringent as the ones mentioned in this Agreement.

8.4 The Consultant agrees to immediately notify IUCN in writing if it becomes aware of any disclosure in breach of the obligations of this clause 8. It shall be responsible for any breach of these obligations by its employees or subcontractors. The Consultant will take all steps necessary to prevent further disclosure.

## **9. PROPERTY OF RESULTS**

All notes, memoranda, correspondence, records, documents and other tangible items made, by the Consultant in the course of providing the Services will be and remain at all times the property of IUCN. At any time, even after the termination of this Agreement, the Consultant shall, upon request, promptly deliver to IUCN all such tangible items which are in its possession or under its control and relate to IUCN, its business affairs and clients and/or the Services.

## 10. INTELLECTUAL PROPERTY

10.1 Intellectual Property rights are any and all rights and prerogatives, registered or not, arising from the Swiss and international legislation on the protection of notably patents, design, trademark, as well as know-how and trade secrets.

10.2 Pre-existing Intellectual Property (Pre-existing Rights”) of a Party means any rights, title and interests in, to and under any and Intellectual Property that have been conceived or developed by such Party prior to the Effective Date or that is conceived or developed by such a Party at any time wholly independently of the implementation of this Agreement. Subject to the rights and licenses expressly granted under this Agreement, each Party shall retain ownership of its Pre-existing Rights. The Consultant hereby grants to IUCN a non-exclusive, worldwide, perpetual, royalty free, sub-licensable license to use Pre-existing Rights incorporated in the Services. The Consultant shall ensure that it has obtained all the rights to use any Pre-existing Rights belonging to third parties that are necessary to implement this Agreement.

10.3 All Intellectual Property rights, including copyright, in the Services produced under this Agreement are vested in IUCN and the Consultant hereby assigns and agrees to assign to IUCN or its nominee, with full title guarantee, all rights in and to any Intellectual Property resulting from the implementation of this Agreement for the full duration of such rights, including, without any limitations, the right to use, publish, license, translate, sell or distribute, privately or publicly, any item or part thereof wherever in the world enforceable.

10.4 The Consultant confirms that IUCN shall have all rights of development, manufacture, promotion, distribution and exploitation in relation to the projects undertaken and products developed in the course of the provisions of the Services and the Intellectual Property created or arising from the provision of the Services.

10.5 Neither Party shall have the right to use the other Party’s name, logo and/or other trademarks in any medium and for whatever purpose without the other Party’s prior written consent in each instance of use.

## 11. LIABILITY AND INDEMNITY

11.1 IUCN shall not be held liable for any damage caused or sustained by the Consultant, including any damage caused to its employees and / or third parties as a consequence of or during the provision of the Services or the implementation of the Present Agreement.

11.2 The Consultant agrees to indemnify and hold IUCN harmless from any and all losses and damages that IUCN may incur as a result of Consultant’s actions or omissions in rendering the Services or the breach of any of the Consultant’s obligations contained in this Agreement.

## 12. COMMUNICATION AND NOTICES

12.1 All correspondence and notices in connection with the implementation of this Agreement must be directed as follows:

IUCN Contact Person	Consultant Contact Person
[name] [title] [name of IUCN Programme/Office] [address] [phone] [email]	[name] [title] [address] [phone] [email]

12.2 In case the Contact Person is being changed, the authorized representative of each Party shall notify the other Party in writing (email accepted).

### **13. ETHICS, FRAUD AND CORRUPTION**

13.1 The Consultant shall comply with the principles and expected standards of conduct equivalent to those stipulated in Section 4 of the Code of Conduct and Professional Ethics for the Secretariat, available at [https://www.iucn.org/downloads/code\\_of\\_conduct\\_and\\_professional\\_ethics.pdf](https://www.iucn.org/downloads/code_of_conduct_and_professional_ethics.pdf), which by signing this Agreement, the Consultant confirms it has reviewed and accepted.

13.2 The Consultant shall take all necessary measures to prevent any situation where the impartial and objective implementation of the Agreement is compromised for reasons involving economic interest, political or national affinity, family or emotional ties or any other shared interest.

13.3 The Consultant represents and warrants that there are no potential or actual conflicts of interests in relation to the implementation of this Agreement. If, during the course of this Agreement, the Consultant becomes aware of facts which constitute or may give rise to a conflict of interest, the Consultant shall promptly inform the IUCN Contact Person in clause 12.1 in writing, without delay. The Consultant shall immediately take all the necessary steps to rectify this situation. IUCN reserves the right to verify that the measures taken are appropriate and may require additional measures to be taken within a specified deadline.

13.4 The Consultant shall take all necessary precautions to avoid fraud and corrupt practices in implementing this Agreement. The Consultant shall comply with the standards of conduct equivalent to those stipulated in IUCN's Anti-fraud Policy, available at [https://www.iucn.org/downloads/anti\\_fraud\\_policy.pdf](https://www.iucn.org/downloads/anti_fraud_policy.pdf), which by signing this Agreement, the Consultant confirms it has reviewed and accepted.

13.5 The Consultant shall cooperate fully in any investigations linked to events under this clause which may be carried out by IUCN and/or the Donor and shall give access to all records (and to its staff if applicable) in the event that this is needed to support investigations of complaints of unethical behavior, fraud or corruption. IUCN reserves the right to take necessary legal action and/or terminate the Agreement in accordance with clause 16 if it determines that any fraud, corruption and/or unethical behaviour has occurred. Any repayment claim may also include interest, investment income or any other financial gain obtained as a result of the fraud.

### **14. NON-DISCRIMINATION AND POLICY ON THE PROTECTION FROM SEXUAL EXPLOITATION, SEXUAL ABUSE, AND SEXUAL HARASSMENT (SEAH POLICY)**

14.1 IUCN recommends the Consultant to apply non-discriminatory practices in terms of benefits and remuneration for both men and women employees in the performance of this Agreement.

14.2 The Consultant will comply with the principles and standards of protection equivalent to those stipulated in the SEAH Policy available at [https://www.iucn.org/sites/dev/files/seah\\_revised\\_version\\_2020apr27.pdf](https://www.iucn.org/sites/dev/files/seah_revised_version_2020apr27.pdf)

### **15. PROCESSING OF PERSONAL DATA**

15.1 Personal Data is any information relating to an identified or identifiable individual, unless otherwise defined under applicable law. The Parties commit themselves to respect applicable data protection laws and regulations and process Personal Data in accordance with the terms of this Agreement.

15.2 IUCN may share Personal Data of the Consultant and / or Consultant Key Personnel with the Donor and other IUCN partners strictly involved in the implementation of the Project. The Consultant will have the right of access its Personal Data and the right to rectify any such Personal Data held by IUCN. If the Consultant has any queries concerning the processing of Personal Data, it shall address them to IUCN using the online form located at (<https://portals.iucn.org/dataprotection/requestform>).

15.3 IUCN may in the course of performance of this Agreement provide the Consultant with Personal Data. The Consultant shall limit access and use of Personal Data to that strictly necessary for the performance of this

Agreement and shall adopt all appropriate technical and organizational security measures necessary to preserve the strictest confidentiality and limit access to Personal Data.

15.4 Where the Consultant engages another processor for carrying out specific processing activities on behalf of IUCN, the same data protection obligations as set out in this Agreement and the applicable law shall be imposed on that other processor by way of an agreement. Where that other processor fails to fulfil its data protection obligations, the Consultant shall remain fully liable to IUCN for the performance of that other processor's obligations.

15.5 Where Personal Data is transferred to a country that has not been deemed to provide an adequate level of protection for Personal Data or to an International Organization within the meaning of Regulation (EU) 2016/679, the Consultant shall ensure that appropriate safeguards in accordance with applicable law are provided.

15.6 The Consultant shall promptly, and in any case within twenty-four (24) hours inform IUCN through the online form located at (<https://portals.iucn.org/dataprotection/requestform>), if it determines and/or discloses to a competent public authority and/or affected data subjects that a Personal Data breach has occurred.

## **16. TERMINATION**

### **16.1 Termination for cause**

16.1.1 IUCN reserves the right to terminate this Agreement in whole or in part, upon written notice with immediate effect in the event that the Consultant:

- i. has falsified or provided inaccurate, incomplete or misleading information in any documentation provided to IUCN;
- ii. defaults in carrying out any of its obligations under this Agreement;
- iii. has engaged in illegal acts, including, without limitation fraudulent or corrupt actions as defined in Code of Conduct and Professional Ethics for the Secretariat and IUCN's Anti-fraud Policy (hereafter referred to as a "Fraud");
- iv. enters into liquidation or dissolution other than for the purpose of an amalgamation or reconstruction; or
- v. ceases to carry on business, has a receiver or administrator appointed over all or any part of its assets or undertaking, enters into any composition or arrangement with its creditors or takes or suffers any similar action in consequence of a debt or other liability, or undergoes any process analogous to the foregoing in any jurisdiction throughout the world.

16.1.2 If it is determined that the Consultant has committed Fraud in competing for or in the performance of this Agreement, all expenditures incurred under this Agreement shall be undue and the Consultant shall promptly reimburse IUCN for all expenditures incurred in the performance of this Agreement.

### **16.2 Termination for lack of Donor funds**

IUCN shall have the right to terminate this Agreement with immediate effect and without any liability for damages to the Consultant in case the agreement between IUCN and the Donor is terminated and/or the Remuneration funds become unavailable to IUCN.

### **16.3 Termination for force majeure**

16.3.1 The performance of this Agreement by either Party is subject to acts of God, war, government regulations, epidemics, pandemics, disaster, strikes (excluding strikes of respective Parties' personnel), civil disorders, curtailment of transportation facilities, or other emergencies making it illegal or impossible for either Party to perform its obligations ("Force Majeure Event"). The Party subject to a Force Majeure Event shall promptly notify the other Party of the occurrence and particulars of such Force Majeure Event, including how it

impacts the performance of its obligations under this Agreement. The Party so affected shall use diligent efforts to avoid or remove such causes of non or delayed performance as soon as is reasonably practicable.

16.3.2 This Agreement may be terminated unilaterally without compensation for any one or more of the foregoing reasons by written notice from one Party to the other.

16.3.3 Notwithstanding the above, the Parties may agree to a suspension or an extension of the Agreement as deemed appropriate. Upon termination of the Force Majeure Event, the performance of the suspended Services shall without delay recommence.

16.3.4 The Party subject to the Force Majeure Event shall not be liable to the other Party for any damages arising out of or relating to the suspension or termination of Services by reason of the occurrence of a Force Majeure Event, provided such Party complies with all the requirements under this article 16.3.

#### 16.4 Effects of Termination

In the event of termination under this clause, IUCN shall pay the Consultant any outstanding Remuneration in respect of Services performed by the Consultant up until the effective date of termination, it being understood that the total amount payable by IUCN to the Consultant shall not exceed the Remuneration stated in clause 5 of the Agreement. The Consultant shall within thirty (30) days of termination, and at IUCN's request:

16.4.1 to the extent possible, complete the Services subject to the Remuneration made available until the date of termination and stop all ongoing activities;

16.4.2 refund to IUCN any advance payments received in excess of the total expenditure incurred as evidenced in the invoices submitted to IUCN,

16.4.3 reimburse IUCN for any expenditures made in breach of the terms of this Agreement and

16.4.4 submit final technical and financial reports and any other materials, deliverables, works or other outputs created as at the date of termination under this Agreement.

### 17. APPLICABLE LAW AND DISPUTE RESOLUTION

17.1 The performance and interpretation of this Agreement will be subject exclusively to the laws of Switzerland, excluding its conflict of laws principles.

17.2 Any dispute arising out of or in relation with this Agreement that cannot be resolved amicably by the Parties or by way of mediation shall be submitted to the competent courts of Lausanne, Switzerland.

### 18. GENERAL PROVISIONS

18.1 This Agreement is the complete understanding between IUCN and the Consultant and replaces all other agreements and understandings in reference to the subject matter of this Agreement.

18.2 Any modification or amendment of this Agreement shall be in writing and shall become effective if and when signed by both Parties.

18.3 This Consultancy Agreement is non-exclusive. IUCN is free to consult other experts in the Consultant's field of specialization.

18.4 This Agreement is personal to IUCN and the Consultant, and neither Party may sell, assign or transfer any duties, rights or interests created under this Agreement without the prior written consent of the other.

18.5 Either Party waives all and any rights of set-off against any payments due hereunder and agrees to pay all sums due hereunder regardless of any set-off or cross claim.

18.6 All provisions that logically ought to survive termination of this Agreement shall survive.



This Agreement may be executed in counterparts, each of which shall be deemed to be an original, but all of which, taken together, shall constitute one and the same agreement. The Parties agree that the signed counterparts may be delivered by e-mail in a ".pdf" format data file or electronic signature (e.g., DocuSign or similar electronic signature technology) and thereafter maintained in electronic form, and that in this case such signature shall create a valid and binding obligation of the party executing with the same force and effect as if such ".pdf" or electronic signature page were an original thereof.

**Signed on behalf of:**

**IUCN, International Union for  
Conservation of Nature and  
Natural Resources**

**[full name of OTHER PARTY]**

Date: \_\_\_\_\_

Date: \_\_\_\_\_

**[Name of representative]**

**[Name of representative]**

**[Position of representative]**

**[Position of representative]**

**ANNEXES**

**[please list all annexes named in the Agreement]**