

17<sup>th</sup> June 2026

Ref. No: Union/HQ/2026/003

## Request for Proposal for a multi-year agreement to manage elements of the Union World Conference on Lung Health 2027–2029

### 1. BACKGROUND

- 1.1. **The Union** is a global membership, technical and scientific organisation. We were established in 1920 and are led by people who are committed to our vision, mission and values. Our members are organisations and individuals from all parts of the world. We bring together clinicians, managers, policy makers, front-line workers and implementers, scientists, patients and survivors, advocates and civil society. In collaboration with national Ministries of Health and international partners, we develop, promote and evaluate effective strategies for tuberculosis control in low- and middle-income countries.
- 1.2. The Union provides technical assistance to national tuberculosis control programs, leads various research projects, conducts international and national courses in several languages, organises world conferences, publishes several guides and peer reviewed journals (*International Journal of Tuberculosis and Lung Disease*, *IJTLD Open*, *IJTLD CRD* and *Public Health Action*). In addition to tuberculosis, The Union is also involved in tobacco control and non-communicable diseases. For more information, visit [www.theunion.org](http://www.theunion.org).

### 2. PURPOSE

- 2.1. The Union seeks to engage an agency on a multi-year agreement to manage elements of the Union World Conference on Lung Health (WCLH) from 2027–2029.
- 2.2. In pursuance of this objective The Union has decided to carry out the bidding process for hiring of an agency to whom the contract may be awarded. This RFP should not be considered as an agreement or offer by The Union to the prospective bidders. The purpose of this RFP is to provide interested parties with information that may be useful to them in the submission of proposals pursuant to this RFP.
- 2.3. The Applicants must submit their applications in accordance with the requirements contained in this RFP.
- 2.4. The Union reserves the right to update, amend and supplement the information in this document including qualification process before the last date and time of submission of applications.

### 3. GENERAL TERMS OF BIDDING

- 3.1. All bidders are required to submit their bid in accordance with the terms set forth in this RFP.
- 3.2. Notwithstanding anything to the contrary contained in this RFP, the detailed terms specified in the Agreement shall have overriding effect. Provided that any conditions or obligations imposed on the bidder hereunder shall continue to have effect in addition to its obligations under that Agreement.
- 3.3. The Union reserves the right to invite fresh bids with or without amendment of the RFP at any stage or to terminate at any time the entire bidding/selection process without any liability or any obligation to any of the bidders and without assigning any reason whatsoever.
- 3.4. The Union will not guarantee any minimum quantity of business under any contract. Also, The Union reserves the right to split the business amongst the agencies keeping in mind the interest of the organisation. The Union reserves the right to enter into contract with multiple bidders/agencies at the same time.
- 3.5. Bidder may submit a proposal as a single entity or collaborate with other Service Providers to present a proposal either by submitting a joint proposal or through subcontracting. Proposals may also combine both approaches. The legal status and role of each legal entity shall be clearly described in the proposal.
- 3.6. A bidder shall not have a conflict of interest that affects the bidding process. Any bidder found to have a conflict of interest shall be disqualified.
- 3.7. Also, the bidder should not have been convicted/charge-sheeted for any criminal offence. Any entity which has been convicted for any criminal offence shall not be eligible to submit the bid.
- 3.8. The bidder must have no affiliation with the tobacco industry and/or its agents/associates and currently does not accept and shall not accept financial or other support from any tobacco product manufacturer or the parent, subsidiary or affiliate of a tobacco product manufacturer until at least 12 months after the end of the Agreement period. Failure to comply may constitute grounds for termination of the Agreement.
- 3.9. Any entity which has been convicted for any criminal offence shall not be eligible to submit the bid.

### 4. GENERAL DISCLOSURES

- 4.1. Respondents must disclose:
  - 4.1.1. If they are or have been the subject of any proceedings or other arrangements relating to bankruptcy, insolvency or the financial standing of the Respondent including but not limited to the appointment of any officer such as a receiver in relation to the Respondent personal or business matters or an arrangement with creditors or of any other similar proceedings.
  - 4.1.2. If they have been convicted of, or are the subject of any proceedings, relating to:

- 4.1.2a. Criminal offence or other offence, a serious offence involving the activities of a criminal organisation or found by any regulator or professional body to have committed professional misconduct.
- 4.1.2b. Corruption including the offer or receipt of any inducement of any kind in relation to obtaining any contract, with The Union or any other contracting body or authority
- 4.2. Failure to fulfil any obligations in any jurisdiction relating to the payment of taxes
- 4.3 If they have any business relationship with or knowingly received payment or other support from any tobacco product manufacturer or wholesaler (the “**Tobacco Industry**”), or any parent, affiliate, subsidiary, organisation, or foundation with majority support from the Tobacco Industry, or any person, interest group, advocacy organisation, or other business or organisation (other than a law firm, advertising agency, or accounting firm) that represents the interests of the Tobacco Industry.

## 5. SCOPE OF WORK INTRODUCTION

The WCLH is the world’s largest gathering of clinicians and public health workers, health programme managers, policymakers, researchers and advocates working to end the suffering caused by tuberculosis and lung disease, with a focus specifically on the challenges faced by low and lower-middle income populations.

The WCLH is an annual event (typically in the 3<sup>rd</sup> week of November), attracting 3,000–5,000 delegates, with representatives from over 130 countries.

General information about our conferences is available at: <https://worldlunghealth.org/> and the 2025 Abstract Book is available [here](#)

The 2025 Conference Programme PDF is available on request from the Procurement team. The high-level programme for 2024 is here: <https://conf2024.theunion.org/> and for 2025 here: <https://conf2025.theunion.org/>

Information on TB Science: <https://worldlunghealth.org/tbscience/>

Information on Community Connect: <https://worldlunghealth.org/community-connect/>

As a consequence of the cuts to global funding for public health, we are keen to ensure our conferences are run as effectively as possible, both in terms of costs and the revenue raised. For this reason, we have taken a more long-term approach to countries and venues (see Annexure) and are assessing interest in a multi-year RFP.

In your responses, please highlight any efficiencies this approach presents and describe the specific benefits of partnering with your organisation.

RFP responses must include all costs in detail associated with the delivery and management of the Services covered in this request, including, but not limited to, any national or local taxes that are applicable, permits to operate or permits required by staff to work, and any costs associated with currency requirements. Costs quoted in the RFP response must be in US Dollars.

## COMPONENTS TO INCLUDE IN THE RFP RESPONSE

### 5A. Venue search for the 2028 and 2029 WCLH and venue scoping exercise: **REQUIRED.**

Please advise on your approach to identifying a suitable venue for WCLH 2028 and WCLH 2029:

- For 2028, the venue will be in a high burden TB country, in the African region.
- For 2029, the venue may be in a low burden TB country in WHO Europe Region.

Your response should also incorporate details on the plan for scoping the venue and the key deliverables (e.g., a full set of venue visuals, proposed venue plans for all areas, and mapping of all required space usage for the full conference delivery).

Your plan should include detail on how you would assess the venues, using The Union criteria (see Annexure A) and geographical focus areas (Annexure A), how you would short list the locations and venues, and the level of effort required to conduct a location and venue scoping exercise to allow The Union team to decide on the most appropriate choice.

Please include a specific line item in the financial proposal to account for this exercise.

Also, please note the difference between 5A and 5E. 5E is an optional element to provide strategic input and advisory role on potential future country/site selection.

### 5B. Online Registration Platform and onsite registration delivery: **REQUIRED**

The RFP response to include a plan for an online and onsite registration delivery service. Please refer to the detailed registration specification for the response (**Annexure F**).

Please include a response for 2027, 2028 and 2029 based on a registration system for 4,000 delegates, with the 2027 WCLH being held in the Bali International Convention Centre, Nusa Dua, Bali, Indonesia: <https://baliconvention.com/>, and 2028 and 2029 venue to be determined, but similar delivery parameters.

### 5C. 2027 WCLH Delivery: **REQUIRED**

Please include a detailed description and costing for the items numbered **5C i-xiv** below. For the purposes of the RFP response, please consider that the 2027 WCLH will be held in the Bali International Convention Centre, Nusa Dua, Bali, Indonesia: <https://baliconvention.com/>.

For the purposes of this section of the RFP, please base your costing on a conference delivery for 4,000 delegates onsite. The conference will be held over 4 days, from Tuesday - Friday, in the second or third week of November.

Please ensure that all sections of the RFP response are addressed in the technical response, in the order listed below and that the financial quotation is aligned with the section headings, **5C i-xiv**, as itemised below and follows the format in Annexure C.

**5C i) Venue Planning 2027: REQUIRED**

The RFP response to include a plan and an estimated cost for venue scoping and the deliverable of full set of visuals on the venue (video, photos)

- Detailed drawings of the venue with suggested usage of all venue areas to include:
  - Registration area and cloakroom space
  - Exhibitor area
  - Sessionrooms X10 (9 core programme, 1 Community Connect) ; Plenary room x1
  - Side meeting rooms space x5
  - Community Connect Space
  - Networking areas and food and beverage areas
  - Volunteer space (300 volunteers), Speaker Centre
  - Operational team offices for conference delivery team
  - Executive Office, Union Board Office
  - Specialist on-site services spaces- see specifics below

**5C ii) Registration Area set up and infrastructure: REQUIRED**

The RFP response to include a functional registration area with all necessary infrastructure in place, for the registration team to be able to deliver registration during the event.

The RFP response to include staffing plan for registration for 5 days of the event, including pre-conference day, with a decreasing amount of support needed as the conference progresses.

**5C iii) Scenic, staging and room set up for the session rooms: REQUIRED.**

For the purposes of the RFP, consider 10 session rooms, each with a capacity of 300 and one plenary room (capacity 1200)

These rooms are used to deliver the abstract sessions, the oral abstracts and the symposia, the daily plenary and satellite sessions.

The RFP response and quotation is to include

- Stage set up-carpets, seating, tables, prompt screens
- Davos style seating and staging for plenary session
- Front of House (FOH) Coverage for all
- iPads for all session rooms for Q&A

**5C iv) Exhibition: REQUIRED**

To provide the design, infrastructure build and management of the Conference Exhibition space.

For the purposes of this request, this is limited to 40 exhibition units of various sizes in shell scheme format. The proposed size distribution:

- 10 units – 2m x 2m
- 18 units – 3m x 3m
- 7 units – 6m x 3m
- 3 units – 6m x 6m
- 2 units – 9m x 6m

The RFP response will include the provision, installation and removal of the basic wall structures, lighting and a power outlet as standard per booth. The quotation will include a basic furniture package of table and 2 chairs per booth.

There should also be a listing of additional items, fully costed to include graphics and furniture packages which exhibitors can order to complete their booth “look and feel”.

There should be the inclusion of an online store shopfront, developed by the provider, which allows all exhibitors to order the graphics packages and order the furniture and any extra AV materials for their specific booth

In addition, the RFP response quotation must include all costs required for:

- The design and layout of the exhibition floor to fit the venue space
- The management of the area on-site during the build, open days and the de-rig days including removal of all elements and ethical wastes management
- The production and distribution of an exhibitors’ manual of operations, 12 weeks in advance of event with a nominated person available for pre-calls with exhibitors
- Online store of all goods and services for exhibitors to purchase upgrade packages, including graphics, power and furniture, 12 weeks in advance of the event
- Full process for management of any custom build booth spaces to ensure integration in overall exhibition area
- Print proofing services

The RFP response must also include:

- All costs associated with ensuring that the exhibition and exhibitors’ operations meet all local and national safe working requirements.
- A system for ensuring and documenting that all exhibitors have the correct type and level of insurance(s) in force (e.g. Health & Safety paperwork, Risk and Methods documentation (RAM)).
- Staffing and systems to deliver an onsite help desk during the build stage and all open days of the event.
- An online help desk service for exhibitors to provide a response to their questions and information requests, with a turnaround time of 24 hours.

### **5C v) Audio, Visual and Lighting: REQUIRED**

The RFP response to include detail and costing to provide, install, remove and manage all the audio, visual and lighting requirements for ten presentation session rooms and one plenary session room that will be operating simultaneously

It is assumed, for the purpose of the quotation, that each room has a capacity for min 300 delegates and there are no infrastructure elements other than power available in the room. The normal operating hours for each room are from 08:00 to 20:00 over four days.

Lighting should allow for a minimum even stage wash and lectern focus.

Minimum requirements are for the procurement, installation, operation and removal of a screen(s) of a suitable size and quality for medical based presentations (fine text) and projection facilities to enable presentations from the (3rd party) presentation management system to be displayed with the presenter operating the presentation via a laptop.

A VLAN internet drop will be required for each room to connect to the laptop (laptop supplied by the presentation management supplier). Most presentations consist of PowerPoint type presentation.

A sound system and provision of microphones to enable questions to be asked from the floor and responded to by the presenter(s).

The RFP response quotation should include provision for on-site technical support in each room during operating hours and account for any needed overnight changes.

#### **5C vi) E-poster area design and set up: REQUIRED**

The RFP response to include a proposed set up for the e-poster area, including the necessary audio, visual and lighting for area.

The response to include appropriate technical support for delegates during e-poster sessions.

The e-poster design and set up should include:

- Freestanding unit for screen mounting to display 9 e-Poster screens;
- Appropriate fit out for e-poster display
- 55" Touchscreens X 9 screens
- 750 headsets (over-ear, not in-ear), with 9 x channels of audio
- Wired internet in area to allow for Internet connectivity and channel selection.

#### **5C vii) Community Connect area - design and set up: REQUIRED**

Community Connect (CC) is where affected community and civil society representatives come together to share experiences and develop solutions on issues surrounding lung health. The CC space includes one open space for events and sessions; one main session room; a networking space; art installation space.

The RFP response to include:

- Furniture for communal seating and networking in the Community Connect area
- Scenic, Dressing, Signage and Branding and set up of stage area for core area within the space to include staging, carpeted, ramp to stage
- Audio, visual and lighting requirements for the area
- Art Wall space for installations/exhibitions within the area
- Exhibition area in Community Connect to include
  - 8 booths of 2x2 metre shell scheme build, each with carpet, electrical, structure and lighting and reception desk and 2x chairs per stand

#### **5C viii) Side room space set up: REQUIRED**

The RFP response to include the set-up of 5 side meeting rooms in boardroom style for 20 people

The room specification to include as standard

- 1x 55"screen with sound capacity
- Capacity to connect laptop to screen in room
- Wifi enabled in rooms

#### **5C ix) Networking areas: REQUIRED**

The RFP response to include a suggested plan for networking areas for delegates within the venue. These areas are used for unofficial meetings and hang out space.

The RFP response to include items that enhance the delegate experience

- Furniture: furnishing of the key networking areas to allow for delegate meetings and food and beverage areas within the venue
- Charging stations for delegates

#### **5C x) Onsite branding and signage all areas: REQUIRED**

The RFP response to include a plan for overall venue signage and branding to ensure delegate flow, clarity and visibility/branding across all areas of the venue, both internal and external.

The RFP response to also include

- Two wall structures: a Welcome wall with branding and a wall to display Union Christmas Seals awards, both walls to be of 5 m(L) x 4 m (H)
- 10 digital totems/LED screens to be placed around the venue, and used for sponsored content

#### **5C xi) Content and Broadcast: REQUIRED**

The RFP response to detail the equipment and support services to Content Capture the presentations, including presenter graphics, given in 10 sessions rooms and one plenary

room of the entire programme, and enable this content to be collated, manipulated and then live streamed to registered delegates both at the Conference and in virtual locations around the world.

Content must be made within 24 hours, as video on demand and collated to be made available as free-to-view during and after the conference for all registered delegates.

The content delivery network must be robust for worldwide availability, including China, and integrate seamlessly with The Union's existing conference app for delegate viewing.

### **5C xii) Specialist Services: REQUIRED**

The RFP response to include:

- The production of an Event Safety Management Plan, a Public Safety plan and on-site safety provision, including staff, for the safe delivery of the Conference of approximately 4000 delegates
- Production of a Security plan and on-site security provision, including staff, for the safe delivery of the Conference of approximately 4000 delegates
- Production of a Medical plan and on-site medical provision, including staff, for the safe delivery of the Conference of approximately 4000 delegates
- A staffing plan for cloakroom and cleaning staffing for all event days

### **5C xiii) Delivery Production team: REQUIRED**

The RFP response to include detail and costing on:

- Production team for the event delivery- offsite planning, scoping and design team to include project management of the event and listing of key personnel for entire project
- Onsite event production team to include onsite delivery team and descriptive of integration plan for core delivery team, and annual onsite team
- Photography and Video: Include costs for 1 videographer and 1 photographer for the event duration, who will take direction from the Union team.
- Resource to manage venue, hotel contracts and hotel room bookings within hotel allocation on behalf of The Union
- Resource to manage full food & beverage planning for entire event; including menu development, dietary requirements and food safety compliance for crew, client and delegates.

- Resource to create and oversee an online booking service for menu selection and ordering of F&B for conference clients (exhibitors, side meeting hosts, etc)
- Travel and food allowance/per diem costs for project team to deliver event
- Accommodation: Please note, there is no need to add costing for this as the project team will be accommodated within The Union allocation at the venue.

#### **5C xiv) Technical infrastructure of Venue: REQUIRED**

The RFP response to consider and include, based on venue capacity

- Internet and Wi-Fi provision for all delegates
- Power and constancy of electricity supply for all services
- Interface capacity with Union existing providers for app delivery; speaker services; registration services
- Translation options and suggested use of AI

#### **5D: Conference Delivery 2028 and 2029: REQUIRED**

The RFP response is to provide descriptive text and indicative budget for conference management services for the 2028 and 2029 conferences based on the scope outlined in this RFP and inclusive of the core delivery elements defined in section **5Ci-xiv** above for the 2027 WCLH.

As venues for the 2028 and 2029 conferences are yet to be finalised and will be chosen in collaboration with the selected service provider, the financial proposal submitted will be based on reasonable planning assumptions and will be used for evaluation purposes only and will not constitute a binding commitment by either party.

Upon confirmation of the conference venues and any specific requirements for those years, the selected service provider will be requested to submit a detailed budget which will be negotiated and agreed upon before final approval.

Please use the following assumptions for your estimates:

- For 2028, the venue will be in a high burden TB country, in the African region.
- For 2029, the venue may be in a low burden TB country in WHO Europe Region.

#### **5E. Strategic input and advisory role on potential future site selection: OPTIONAL.**

In the RFP response, please describe your organisation's capacity and experience to engage with national stakeholders in the relevant geographies (Annexure A), with a view to building relationships in the delivery site and securing funding for cost-contribution to the WCLH delivery. Please also advise on your organisation's capacity to collaborate with The Union on building additional revenue streams within the conference delivery model. Please also detail any information on the potential to engage relevant exhibitors and/or commercial sponsors.

Please illustrate your response with examples of prior work and how you would recommend specific countries and potential venues for WCLH. If your organisation has the capacity to deliver this component, or you will partner with another Service Provider (see section 3.5), please include indicative costs in the financial proposal to account for this exercise.

## CONSIDERATIONS

The RFP response must include the delivery of all elements listed above. If any third-party contractors are to be used, this must be declared and detailed information to be provided as to how these third parties will be evaluated in terms of:

- The quality of their service/s
- The on-site management to ensure fault free delivery
- Ensuring on time delivery within a fixed budget
- Include the mechanism for underwriting of third-party contracts in terms of responsibility and financials

## CONDITIONS

The successful request will be decided with consideration of the following key factors:

- Design creativity and quality
- Past experience and portfolio
- Compliance with deadlines
- Price competitiveness

**Respondents will need to provide 2 Nominated Customer References The Union can contact for recommendations as part of the selection process.**

## 6. ELIGIBILITY CRITERIA

On successful completion of eligibility criteria, the service provider will be considered for technical and financial evaluation. List of documents mentioned will be considered for assessment of eligibility criteria.

The service provider will be assessed on the basis of following: -

Sl. No.	Eligibility Criteria	Documents to be submitted with Technical Proposal
1	Bidder is a legally registered entity	Provide a copy of the statutes/registration of the legal entity
2	No conflicts of interest in accordance with clause 4.	Signed disclosure to be submitted

3	Not declared bankruptcy, not involved in bankruptcy or receivership proceedings, and there is no judgment or pending legal action against the vendor that could impair its operations in the foreseeable future.	Signed undertaking to be provided
4	Previous Experience Minimum 5 years of relevant experience.	<p>Please list only previous similar assignments successfully completed in the last 3 years. List only those assignments for which the Bidder was legally contracted or sub-contracted by the Client as a company or was one of the Consortium/JV partners. Assignments completed by the Bidder's individual experts working privately or through other firms cannot be claimed as the relevant experience of the Bidder, or that of the Bidder's partners or subconsultants, but can be claimed by the Experts themselves in their CVs.</p> <p>The Bidder should be prepared to substantiate the claimed experience by presenting copies of relevant documents and references if so requested by The Union</p>
5	<p>Financial Standing Minimum average annual turnover of USD 7million for the last 3 years.</p> <p>(For JV/Consortium/Association, all Parties cumulatively should meet requirement).</p>	Statement of Financial Accounts for last 3 years
6	Bidder must follow format specifications for bid delivery for both technical and financial proposals	Should the bidder not deliver submission documents in the exact format requested, they will be automatically excluded from the bid analysis even though then have technically qualified.

**7. PROPOSAL SUBMISSION:**

A. Proposals through email are invited from the reputed agency for the aforesaid purpose. The proposal should include the **"Technical" and "Financial"** details.

B. The interested bidder must submit their proposals in two separate emails and should clearly state in the subject line - **"Technical Proposal – Hiring of Agency for multi-year management of elements of the Union World Conference on Lung Health (WCLH) 2027–2029"** and **"Financial Proposal–Hiring of Agency for multi-year management of elements of the Union World Conference on Lung Health (WCLH) 2027–2029"** with all relevant documents as listed in Annexures A, B & C to [Procurement.union@theunion.org](mailto:Procurement.union@theunion.org) by **10<sup>th</sup> July 2026**.

C. The "**Technical proposal**" to be prepared in accordance with documentation as detailed in **Annexure–B and Technical Evaluation Criteria** as indicated in Section 8 of this RFP. The Technical Proposal should not contain any cost information whatsoever.

D. The Detailed **Financial Proposal** shall be in accordance with instructions in **Annexure-** to this RFP.

E. "**Financial Proposal**" shall remain password-protected, and such password shall be obtained by procurement committee appointed by The Union after the Technical Qualification of the Proposal submitted by the bidder.

F. Proposal validity period will be for **180 days** from the date of submission of proposal.

G. You may send your queries to [Procurement.union@theunion.org](mailto:Procurement.union@theunion.org) latest **29<sup>th</sup> June 2026**. After this date, no queries/ questions will be entertained.

H. In case of any change/clarification, a corrigendum will be uploaded latest by **6<sup>th</sup> July 2026 on the Union's website**. Please download the same from the source.

## 8. EVALUATION CRITERIA:

### 8.1 Technical Evaluation – Scoring criteria

Sr. No.	Evaluation Criteria	Maximum Scoring
<b>A)</b>	<b>Bidder's qualification, capacity and expertise</b>	<b>20</b>
1	Brief description of the organisation, including the year and country of incorporation, and types of activities undertaken.	
2	General organisational capability which is likely to affect implementation: management structure, financial stability and project financing capacity, project management controls, extent to which any work would be subcontracted (if so, provide details).	
3	Relevance of specialised knowledge and experience on similar engagements done in the region/country	
4	Quality assurance procedures and risk mitigation measures as demonstrated by supporting documents.	
5	Organisation's commitment to sustainability.	
<b>B)</b>	<b>Proposed Methodology, Approach and Implementation Plan</b>	<b>40</b>
1	A detailed description of the approach and methodology for how the Bidder will achieve the Terms of Reference of the project, keeping in mind the appropriateness to local conditions and project environment. Details how the different service elements shall be organised, controlled and delivered.  The format of the technical proposal document is to clearly follow the different sections as numbered in the RFP, and ensure sufficient level of detail is provided.	
3	Explain whether any work would be subcontracted, to whom, how much percentage of the work, the rationale for such, and the roles of the proposed sub-contractors and how everyone will function as a team.	
4	Implementation plan including a Gantt Chart or Project Schedule indicating the detailed sequence of activities that will be undertaken and their corresponding timing.	

C)	<b>Management Structure and Key Personnel</b>	<b>10</b>
1	Describe the overall management approach toward strategic planning and implementing the project. Include an organisation chart for the management of the project describing the relationship of key positions and designations.	
2	Provide a spreadsheet to show the activities of all personnel and the time allocated for his/her involvement along with CVs for key personnel that will support the Implementation. CVs should demonstrate qualifications in areas relevant to the Scope of Services.	
D)	<b>Presentation and Interview</b> The presentation will be of 30 minutes duration, followed by a 30 minute discussion and time for questions and answers. It will focus on clarification of any questions arising from the technical proposal shared with the review team.	<b>30</b>
	<b>TOTAL SCORE</b>	<b>100</b>
E)	<b>Strategic input and advisory role on potential future site selection</b> (Additional Bonus Points) <ul style="list-style-type: none"> <li>• 10 = Exceptional optional offering with clear added value.</li> <li>• 6 = Meets optional requirement adequately.</li> <li>• 1 = Limited value.</li> <li>• 0 = Not offered</li> </ul>	<b>10</b>

A. Presentation -As a part of Evaluation of proposals submitted by the applicants, The Union may seek further information or a presentation from the organisations for evaluation purposes. The Union may call for such information/presentation at a short notice.

B. The bidder must obtain a minimum **score of 60 for Technical** Qualification of the Proposal submitted by them.

C. The procurement committee appointed by The Union shall review and evaluate the Technical Proposals based on their responsiveness to the **Scope of Work** and **Annexure** to the RFP applying the evaluation criteria, sub-criteria, and the scoring mechanism specified in the above clauses. A Proposal shall be rendered non-responsive at the technical evaluation stage if it fails to achieve the minimum technical score stated herein above.

## 8.2 Financial Evaluation

The Financial Proposals of only those Bidders who achieve the minimum technical score will be opened by the committee appointed by The Union, after obtaining a password from the respective bidder. The Financial Proposal evaluation shall be carried out in reference to **Annexure-C**. The Financial Proposals corresponding to Technical Proposals that were rendered non-responsive shall remain unopened.

**The Financial proposal must follow the format shared in the RFP publication precisely, and be prepared in USD.**

A. The Financial Score shall be calculated through the following formula

**Financial Score = (Lowest Priced Offer / Price of the Offer Being Reviewed) x 100**

B. The proposal will be evaluated on **Quality Cum Cost Based Selection**. Technical Scores obtained shall carry a weight of 70%, whereas the Financial Score shall carry 30% weightage.

C. The Agencies securing the highest combined evaluation score (Top 3) will be invited for negotiations.

## 9. IMPORTANT DATES & TIMES (Table A)

Particulars	Date & Time
Date of floating Request for Proposals	17 <sup>th</sup> June 2026
Last date for question submission	29 <sup>th</sup> June 2026
Corrigendum, if any	6 <sup>th</sup> July 2026
Last date and time for Submission of Proposals	10 <sup>th</sup> July 11:55PM (CET) This is an absolute deadline, proposals received after this date will be disqualified.
Presentation & Technical Evaluation	Within 2 weeks from the date of submission
Financial Evaluation	Second week of August 2026
Signing of Contract	Second week of September 2026

## 10. DURATION

A. The agreement will be for an initial period of **3 years**. The bidder shall be subject to performance evaluation at the end of each year.

B. Extension of the agreement will be made based on annual budget approval and workplan

C. In case of any changes made during the assignment, these changes will be made with mutual agreement specifying the deviations and justifications

## 11. PENALTY CLAUSE:

Please note, in case of delay, The Union may levy a penalty appropriate to the deliverable.

**Successful supplier will subject to Contractual Terms and Conditions of The Union – Annexure E**

**2027: BICC, Bali, Indonesia (subject to confirmation)**

**2028: Region = South & in a High Burden TB Country**

**2029: Region = WHO Europe Region & (potentially) in a Low Burden TB Country**

There are nine criteria which The Union uses to assess the suitability of the conference location; each criterium is assessed on a general level and in the context of the Union World Conference on Lung Health community through the lens of suitability of location to the WCLH community; travel connectivity, level of TB Burden; national stability and civil rights and national support and engagement.

1. **Financial Viability and level of national stakeholder support:** The country level support for the conference (Ministry of Health and other key government and civil society stakeholders) is crucial and involves several elements
  - i. Financial contribution to the event- which is to be agreed ahead of the selection. This contribution cannot be in-kind and must contribute to the running of the conference.
  - ii. General visibility and engagement with the national stakeholders to promote the event and the messaging around it
  - iii. Advisory to consular missions of the host country of the conference existence to ensure visa officers are aware in dealing with visa requests at national level
2. **Openness:** How welcoming/open is the country for conference delegates on a government and public level? Considerations to include visa requirements and challenge to access for global delegates, especially those travelling from LMICs.
  - i. **Henley Openness Index:** How welcoming the country is for the event and guests on a government and public level.
3. **TB Burden and Lung Disease Burden at national level:** high burden vs low burden and aligned with The Union Location Recommendation Document, and its rotational strategy
4. **Human Rights:** How is the country perceived in relation to Human Rights across all main areas for example LBGTQ communities, female equality?
  - i. **Human Right Watch / Human Freedom Index:** The country rating on all human right matters.
5. **Global Peace Index:** General level of safety and stability of the country.
6. **Connectivity:** An overview of airport connectivity, transportation and ease of access to the venue from arrival hubs within the selected city

7. **Delegate Infrastructure:** An overview of flight, hotel, taxi/uber, and food prices in the selected cities to ensure there are accessibly priced options for delegates across all aspects. We need to have
  - i. range of hotel room within access to venue are different price points.
  - ii. Local transport infrastructure vs taxi options from airport to venue
  - iii. Food pricing and offers within venue and close by
  
8. **Production Infrastructure:** The standard of technical, scenic, exhibition options and internet capacity in the locations to be able to deliver the specification for delivery. It should be clearly articulated what infrastructure is included in venue core pricing, and what needs to be added on when recommending venues for consideration.
  
9. **Geographical Location Factors – Environment, Diseases:** Air quality, traffic challenges, endemic diseases, risk of natural disaster

**DETAILED TECHNICAL PROPOSAL OF BIDDER**

Proposals should include the following information:

1. A brief profile of the Bidder/Applicant (Organisation), with the details of the head of the organisation and team/ facilitators who will be involved in the assignment (1 page)
2. Proposed Methodology, Approach and Implementation Plan, timelines (up to 4 pages)
3. Technical description of each of the areas outlined in section 5A-D of the RFP document, **following the format of the different headings**. (up to 8 pages)
4. Proposed Methodology, Approach and Implementation Plan for the optional strategic approach, outlined in section 5E (up to 2 pages)
5. Details as per the Technical Evaluation criteria indicated at Section 8 of the RFP document. (up to 2 pages)
6. Provide a minimum of two (2) trade references that the Bidder have partnered with on similar interventions as mentioned in the RFP including names of persons, who may be contacted, position of person, address and phone number. (1 page)
7. Letter of interest (LOI)/Cover letter on letter head signed by authorised signatory (1 page)
8. Additional information (if any) - no more than 5 pages

**DETAILED FINANCIAL PROPOSAL OF BIDDER**

The Bidder is required to prepare the Financial Proposal following the below format and submit it as indicated in the clause 7 of the RFP. Any Financial information provided in the Technical Proposal shall lead to Bidder’s disqualification. The Financial Proposal should align with the requirements in the Terms of Reference and the Bidder’s Technical Proposal. The financial proposals should include the following:

- (i) Name and address of the Organisation/Institution:
- (ii) Cancelled cheque detailing organisation’s bank account (Non FCRA bank account), account number, bank name, IFSC Code etc.
- (iii) Taxes and other applicable charges to be indicated and clearly outlined in the financial proposal

**Summary of Overall Costs**

Details	COST (USD)
1. Venue search for 2028 and 2029 WCLH inclusive of scoping exercise	
2. Online Registration Platform and onsite registration delivery	
3. 2027 WCLH Conference Delivery in BICC, Bali, Indonesia	
4. 2028 Conference Delivery-Indicative	
5. 2029 Conference Delivery-Indicative	
6. Strategic Input and Advisory role on potential future sites	
7. Any other costs	
<b>Total Cost of Financial Proposal</b>	

**Breakdown of Price per Deliverable- each deliverable area as outlined in the RFP section 5 is to be costed as per the format provided here. Bids returned in a format other than this will be considered ineligible.**

Deliverable/Activity	Time (Person/Days)	Professional Fees	Other cost	Total Costs
<b>5A. Venue search for the 2028 and 2029</b>				

<b>WCLH and venue scoping exercise</b>				
<b>5B i). Online Registration Platform</b>				
<b>5B ii). Onsite registration delivery</b>				
<b>5B iii)Registration delivery staffing/team differentiated for online and onsite</b>				
<b>5C 2027 WCLH Delivery</b>				
<b>(i)Venue Scoping</b>				
<b>(ii) Registration Area set up and infrastructure</b>				
<b>(iii) Scenic, staging and room set up for the session rooms</b>				
<b>(iv) Exhibition</b>				
<b>(v) Audio, Visual and Lighting</b>				
<b>(vi) E-poster area design and set up</b>				
<b>(vii) Community Connect area-design and set up</b>				
<b>(viii) Side room space set up</b>				
<b>(ix) Networking areas</b>				
<b>(x) Onsite branding and signage all areas</b>				
<b>(xi) Content and Broadcast</b>				
<b>(xii) Specialist Services</b>				
<b>(xiii) Delivery Production team</b>				
<b>(xiv) Technical infrastructure of Venue</b>				
<b>5D i) 2028 Conference</b>				

<b>Delivery- indicative</b>				
<b>5D ii) 2029 Conference Delivery- indicative</b>				
<b>5E. Strategic input and advisory role on potential future site selection- OPTIONAL</b>				
<b>Any other costs</b>				



## TERMS AND CONDITIONS OF CONTRACT

### 1. CONFIDENTIALITY

- 1.1 The Contractor shall treat as confidential, during as well as after the performance of any work under this Agreement, any information, including any personal information defined by The Union, to which the Contractor becomes privy as a result of acting under the Agreement (the “**Confidential Information**”). For more certainty, the Contractor shall not disclose any such Confidential Information to any other person or party which is not participating in the Agreement in a form that could reasonably be expected to identify the person, including individuals, to whom such information relates. However, the Consultant may disclose the Confidential Information as required by law, a court or any governmental or regulatory authority.
- 1.2 Where the work to be performed under the Agreement involves access by the Contractor to confidential, classified or protected documents of The Union, the Contractor shall comply with all applicable security procedures and requirements of The Union, keep the Confidential Information secure and not disclose it. Any inquiries as to what information is confidential or what procedures should be applied when handling Confidential Information should be addressed to the Global Human Resources and Finance Departments of The Union.
- 1.3 Information which is or will be in the public domain, is lawfully in the other Party’s possession prior to disclosure and/or has been made available to a Party on a non-confidential basis, is not covered by this clause.
- 1.4 At the end of the contractual relations and at The Union's request, the Contractor must return any document containing confidential information entrusted to it and keep no copy of it.
- 1.5 This provision is valid throughout the duration of the Agreement and after the Agreement reaches its term, and for whatever reasons, for the duration of twelve (12) months.

### 2. DATA PROTECTION

- 2.1 Where processing of personal data is to be carried out, the Contractor guarantees to implement in advance appropriate technical and organisational measures in such a manner that processing meets the requirements of the European General Data Protection Regulation (EU Regulation 2016/679), and ensure the protection of the rights of the data subject as stipulated in Article 28 of the regulation.
- 2.2 Furthermore, the Contractor shall not engage any sub-processor without the prior specific written authorisation of The Union.
- 2.3 The Contractor must delete or return all personal data to The Union as requested at the end of the contract.

### 3. INTELLECTUAL PROPERTY

- 3.1 Nothing in this Agreement shall be construed as implying the transfer of ownership of The Union intellectual property to the Contractor or any of its collaborators or subcontractors.
- 3.2 The Union expressly reserves and retains any rights that are not expressly granted to the Contractor under this Agreement.
- 3.3 Nothing herein shall impose any obligation on The Union to make use of any of the rights set forth herein.
- 3.4 Upon completion of the related payments provided herein, all material created for purposes of the Agreement or provided to The Union as part of the Services hereinafter “**the Contract Material**”, shall be the property of The Union.

#### **4. WARRANTIES AND REPRESENTATIONS**

The Contractor warrants and represents that:

- 4.1 It has full right, power, legal capacity and authority to enter into this Agreement and to carry out all of its terms and conditions and the signatory is a duly authorised representative with full powers to sign this Agreement on its behalf.
- 4.2 It will ensure all aspects of the work to be performed pursuant to this Agreement will conform to The Union’s standards and meet all deadlines specified in the Agreement.
- 4.3 The Contractor warrants that any and all written work submitted under this Agreement are not and have never been published in paper, or any other format with any organisation that may still own proprietary rights to the work.
- 4.4 The Contractor warrants that this work is not currently in the public domain. If any part of this work has been copyrighted, an original letter of permission from the copyright holder to use the work shall be submitted to The Union.

#### **5. NO EXCLUSIVITY**

Nothing in this Agreement shall be construed to establish an exclusivity relationship between The Union and the Contractor. The Union shall be free to select other contractors to conduct work that is within the expertise of the Contractor. The Contractor also retains the ability to conduct work on behalf of other Parties subject to the limitations set out in Clause 19.

#### **6. LIABILITY AND INDEMNIFICATION**

- 6.1 The Union, its officers, employees and agents, shall not be liable for any injury to the person or for loss or damages to the property of the Contractor or of anyone else, occasioned by, or in any way attributable to the Contractor under this Agreement unless such injury, loss or damage is caused by the negligence of an officer, employee or agent of The Union acting within the scope of his employment.
- 6.2 Nothing in the Agreement limits any liability which cannot legally be limited, including liability for fraud, fraudulent misrepresentation, death or personal injury.

6.3 Subject to Clause 9.2, The Union's total liability to the Contractor shall not exceed twice the amount mentioned in Clause 3.1 and the following types of loss are wholly excluded: (i) loss of profits; (ii) loss of sales or business; (iii) loss of agreements or contracts; (iv) loss of anticipated savings; (v) loss of use or corruption of software, data or information; (vi) loss of or damage to goodwill; and (vii) indirect or consequential loss.

6.4 The Parties will mutually defend and forever hold each other and their officers, employees and agents harmless against and from any and all third-party claims, lawsuits, judgments and expenses (including, without limitation, reasonable legal fees) arising out of any breach by the other party of any provision of this Agreement or any misrepresentation made by the other party and its officers, employees or agents. This provision shall survive the termination of the Agreement.

## **7. DEFAULT AND TERMINATION**

### **7.1 TERMINATION FOR CONVENIENCE**

7.1.1 This Agreement may be terminated, in whole or in part, by either Party at any time upon thirty (30) days prior written notice of termination to the other Party.

### **7.2 TERMINATION FOR BREACH**

7.2.1 In the event any Party hereunder shall materially breach any of the terms and conditions contained in this Agreement, the other Party may immediately terminate this Agreement, at its option and without prejudice to any of its legal or equitable rights, effective seven (7) days following formal written notice from the non-defaulting Party, via registered mail with acknowledgement or receipt, if said non-performance has not been cured within such period.

7.2.2 Either Party may terminate the Agreement with immediate effect by giving written notice to the other Party via registered mail with acknowledgement or receipt, in case of breach of the following provisions: Clause 4 (Confidentiality), Clause 5, (Data Protection), Clause 6 (Intellectual Property), Clause 12 (Conflict of interest) or Clause 19 (Affiliation with Tobacco Industry), or in case the Contractor engages in any illegal activity (fraud, corruption, etc.).

### **7.3 TERMINATION IN THE EVENT OF THE OPENING OF COLLECTIVE PROCEEDINGS**

To the extent permissible by the applicable mandatory laws, in the event any Party shall become insolvent or shall suspend its operations or shall file a voluntary petition or answer admitting to the jurisdiction of a court as to the material allegations of insolvency, or shall make an assignment for the benefit of creditors, then the other Party may thereafter immediately terminate this Agreement by giving written notice of termination to such Party or its receiver.

### **7.4 GENERAL PROVISION ON TERMINATION**

7.4.1 Termination may occur at any time, whether Service are in progress or not.

7.4.2 If this Agreement is terminated by The Union pursuant to any of the paragraphs of Clause 10, the Contractor is entitled to reimbursement for those monetary amounts duly expended or obligations duly incurred prior to the termination of the Agreement in relation to

performance of the Services in accordance with Clause 2 provided that they are intimated to The Union during the thirty (30) days following the date of termination. This provision only applies where the Contractor has used best endeavours to mitigate the loss in relation to any such expenses.

7.4.3 Upon termination of this Agreement, The Union shall cease to have any obligation to make any payment to the Contractor in respect of the costs incurred by the Contractor after the date of termination, and, if applicable, the amount of any excess cost paid to the Contractor shall be recognised as being a debt due to The Union.

7.4.4 After the end of the Agreement for any reason, the Contractor undertakes not to use or refer to The Union, its trademarks, name and services, and in general to no longer introduce itself as The Union service provider. The Contractor undertakes to return to The Union all documents, leaflets, files and other materials which may have been delivered to it in the context of the Agreement or which it may have created for the purposes hereof.

## **8. NO AGENCY OR JOINT VENTURE**

Nothing in this Agreement shall be deemed to create an agency relationship or joint venture between the Parties. Each party shall be responsible for all taxes, benefits, withholding, worker's compensation, and health insurance, medical evacuation costs beyond those covered by the travel insurance, and unemployment insurance and similar requirements of their own employees and neither party's employees shall be deemed agents or employees of the other party.

## **9. CONFLICT OF INTEREST**

The Contractor undertakes to take all necessary precautions to avoid conflict of interests in accordance with The Union Conflict of Interest Policy. The Contractor agrees to comply with the policy by signing the Conflict of Interest Disclosure Form and shall inform The Union without delay of any situation constituting or likely to lead to any such conflict during the period of this Agreement.

## **10. SUCCESSORS AND ASSIGNS**

The Agreement shall inure to the benefit of and be binding upon the Parties hereto and their lawful heirs, executors, administrators, successors and assigns.

## **11. ASSIGNMENT**

Neither Party may assign, transfer or dispose of any way its rights and obligations under the Agreement without the prior written consent of the other Party, such agreement not to be unreasonably withheld, except that either Party is authorised to assign, transfer or dispose all or part of their rights and obligations under the Agreement to an affiliated company of its group, subject to prior information of the other Party.

## **12. ENTIRE AGREEMENT**

The Agreement constitutes the entire accord between the Parties with respect to the subject matter of the scope of work and supersedes all previous negotiations, communications and other

Agreements relating to it unless they are incorporated by reference in the Agreement. The Parties hereby waive any claim which may arise from their relations prior to the Agreement.

### 13. NOTICES AND COMMUNICATION

13.1 Where in the Agreement any notice, request, direction, or other communication is required to be given or made by either Party, it shall be in writing and will be effective if delivered in person, sent by registered mail or by e-mail addressed to the Party for whom it is intended at the address mentioned in the Agreement. Any notice, request, direction or other communication shall be deemed to have been given if by registered mail, when the postal receipt is acknowledged by the other Party? and, by e-mail, when transmitted. The address of either Party may be changed by notice in the manner set out in this provision.

13.2 All notices and communications concerning this Agreement shall be addressed to the respective contact people as follows:

**For The Union:**

Name:

Address: International Union Against Tuberculosis and Lung Disease 2  
rue Jean Lantier, 75001 Paris, France

**For the Contractor:**

Name:

Address:

### 14. AMENDMENT, MODIFICATION, WAIVER

This Agreement may only be amended, modified or supplemented by an agreement in writing signed by the Parties. No waiver by any Party of any of the provisions hereof shall be effective unless set forth in writing and signed by the Party so waiving. No waiver by any Party shall operate or be construed as a waiver in respect of any failure, breach or default not expressly identified by such written waiver, whether of a similar or different character, and whether occurring before or after such waiver. No failure to exercise, or delay in exercising, any right, remedy, power or privilege arising from this Agreement shall operate or be construed as a waiver thereof, nor shall any single or partial exercise of any right, remedy, power or privilege hereunder preclude any other or further exercise thereof or the exercise of any other right, remedy, power or privilege.

### 15. FORCE MAJEURE, FORTUITOUS EVENT AND *FAIT DU PRINCE*

15.1 If any party hereto is prevented, hindered or delayed from performing its obligations under the Agreement as a result of a force majeure within the meaning of Article 1218 of the French Civil Code and of the case law of the French courts, such prevention or delay shall not be considered as a breach of the Agreement and that Party shall be relieved from its obligations for the duration of such force majeure, provided however that there is a direct relation between such prevention or delay and the force majeure.

15.2 The Party claiming to be affected by a force majeure shall notify the other Party no later than ten (10) days after the occurrence of force majeure and shall use all reasonable endeavours to mitigate the effects caused by force majeure as well as implement a work

around solution. This written notification shall indicate the day on which the force majeure occurred and the likely effects of the force majeure on its ability to perform its obligation under this Agreement.

15.3 The Party claiming to be affected by a force majeure should also, as soon as possible and in any case not later than ten (10) days after the end of the event force majeure, notify the other Party that the force majeure has ended and resume performance of its obligation under this Agreement.

15.4 In the event of force majeure, the Parties shall do their utmost to remedy the situation as quickly as possible. In the event that the proper execution of the work according to the conditions stipulated in the Agreement is hindered or prevented due to force majeure beyond thirty (30) days, either Party without having to pay indemnity to the other shall be entitled to terminate the Agreement, with effect as from receipt by the other party of the appropriate written notice of termination sent by registered mail with acknowledgment of receipt.

15.5 The Parties will also, without compensation, be relieved of their obligations by the occurrence of events constituting fortuitous events (“cas fortuit”) or “fait du prince” within the meaning of French law and French case law.

## 16. AFFILIATION WITH TOBACCO INDUSTRY

16.1 The Contractor does not have any business relationship with or knowingly received payment or other support from any tobacco product manufacturer or wholesaler (the “**Tobacco Industry**”), or any parent, affiliate, subsidiary, organisation, or foundation with majority support from the Tobacco Industry, or any person, interest group, advocacy organisation, or other business or organisation (other than a law firm, advertising agency, or accounting firm) that represents the interests of the Tobacco Industry (collectively, “**Tobacco Affiliates**”).

16.2 The Contractor currently does not accept and shall not accept financial or other support from the Tobacco Industry or Tobacco Affiliates until at least one year after the end of this Agreement. Failure to comply with this clause may constitute grounds for termination of this Agreement and The Union shall have the right to demand and receive a return of all funds under this Agreement, plus interest, as liquidated damages, other provisions of this Agreement notwithstanding.

## 17. DISPUTE RESOLUTION

17.1 This Agreement is an understanding amongst the Parties hereto and shall bind the Parties to the fulfilment of the terms and conditions contained herein. In the event of any differences or disputes arising out of the interpretation or application of the provisions of this Agreement, the Parties shall immediately consult each other with a view to expeditiously resolve such differences or disputes in a spirit of mutual understanding and cooperation. Such amicable settlement shall be done within (15) days of the first written communication of the dispute between the Parties.

17.2 In the event the Parties fail to reach a settlement, any dispute concerning the validity, interpretation, performance, non-performance or termination of the Agreement or otherwise related to the Agreement shall be submitted to the Commercial Court of Paris.

**18. APPLICABLE LAW**

This Agreement shall be governed by and construed in accordance with the laws of France.

**IN WITNESS WHEREOF**, the Parties have executed this Agreement:

**For The Union:**

**For the Contractor:**

\_\_\_\_\_  
Name  
Title

\_\_\_\_\_  
Name  
Title

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

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

## REGISTRATION SPECIFICATIONS: ONLINE PLATFORM AND ONSITE DELIVERY

### 1. Proposal Scope

The Union is seeking an online and onsite event registration and management solution and partner for the 2027 Conference for 4000 delegates, and for similar offering in 2028 and 2029. This will cover all aspects of an 'online' registration platform and the delivery and management of the full 'on site' registration fulfilment service and high quality delegate experience.

This system should allow users to create both individual and group event bookings, which incorporates a range of registration fees, social event bookings, workshops and enable delegates to become a member of The Union.

To create a bespoke On Line Gateway (OLG) and provide support and to operate the system, while The Union remains responsible for content, operational decisions and the overall delegate experience for the Union World Conference on Lung Health. This includes but is not limited to paying for their registration, providing supportive documentation where necessary, offering added opportunities such as Membership of The Union or paid for events at the time of the Conference.

In addition, to ensure that the online system is a simple and effective method of communication with existing and prospective delegates.

#### System Overview:

The OLG is the primary point of contact for all aspects of delegate sales and ticketing. The system must incorporate both Individual and Group booking processes and be able to manage payments in both STRIPE, the Union's online payment system, and assist in tracking bank transfers to the Union's bank account.

A secondary purpose is to provide a platform for communication with the delegate base and fulfil any additional needs relating to documentation that may be required to facilitate attendance at the Conference.

The OLG also provides the foundation for all On Site Registration fulfilment operations.

The online registration system needs to be ready to go live at the beginning of May of the annual conference timeline. The conference delivery is scheduled for the second or third week of November annually. The onsite registration deliverables are also to be included in the quotation.

All transactions are conducted in Euros

### 2. Delivery requirements

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#### ONLINE PLATFORM

The proposed service should include full management of the following areas:

- Provision of an online event registration system for individual participants, groups and exhibitors, including full setup, form design and production linking to the conference website
- Dedicated and experienced registration manager, who will be a focal contact person with The Union registration coordinator throughout the project process

The OLG must provide the following 'front office' functions:

- I. Creation and management of an individual booking record for a delegate
- II. Creation and management of a group booking record, through a delegate group co-ordinator
- III. Operation and management of a registration pricing structure based on a mix of three criteria at any one time:
  - a. Level of Country income as defined by the World Bank or status (nurse or student). The Union will provide and validate the country classifications.
  - b. Date of Booking
  - c. Membership or Non-Membership of The Union
- IV. Collection of data and provision of a supporting letter of invitation to the conference
- V. Provision of receipt for all STRIPE payments
- VI. Assist in the issuing of fiscal invoice distribution (when/if mandated)
- VII. Issue attendance certificates for delegates at end of conference and provision of bulk email capacity for sharing emails with registered delegates
- VIII. Facilitate a delegate enquires function with a response time of no longer than 48 hours in most cases
- IX. Facilitation of communication function, for platform related issues, with delegates
- X. Integrate within the platform a system for the management of free of charge 'sponsored' delegates – e.g scholars, guests, staff and committees' members and volunteers

The OLG must provide the following 'back office' functions:

- I. Access for and integration within the platform for The Union's financial systems to enable a full income reconciliation process. The Union remains responsible for validating payments and managing bank transfers.
- II. Assist in the tracking of the refund process, The Union remains responsible for refund decisions.
- III. Provision for detailed monitoring
- IV. Access for the generation of detailed information on a weekly basis
- V. API integration with external systems when requested will be specified and subject to a separate quotation. The agreement includes the provision and set up of one (1) read-only integration with a single identified third-party system.
- VI. Provide for the importing of list (via an Excel template) and for the management of defined group registrations
- VII. Reporting of all events' attendee lists, including statistical, demographic and financial reporting, as required, on the schedule agreed with The Union

**ONSITE DELIVERY**

- Development of a comprehensive plan for the management and delivery of the 'on-site' registration fulfilment service

- Working with The Union Registration lead, create and deliver delegate badge and lanyard requirements to a standard agreed and specified by The Union team
- Provide a detailed post event report noting possible improvements and suggested developments for future events
- Flight and reimbursement cost for onsite registration delivery team (excluding local registration hosts)

### 3. System Requirements

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#### 1. Online forms

We require a registration form customised to the needs of the Conference and in accordance to the best practice recommended by the Service Partner, including relevant data capture fields and booking options such as tiered registration fees, workshop bookings and social events.

The supplier needs to work closely with The Union's Conference Team:

- To devise the most effective user journey for the numerous pathways that somebody might need for their registration. It is important that the system can be tailored to the specific needs of the registration process.
- To produce a correctly branded product with a coherent look and feel, and correct use of the Union's house style.
- To ensure a seamless connection with the Conference website.
- To ensure that the online forms should be easy and intuitive for all delegates, responsive on mobile devices and browsers including, but not limited to, Edge, Firefox, Chrome and Safari.
- To deliver a high-quality user experience.

#### 2. Automated elements

A personalised, automated confirmation letter should be sent to each delegate upon completion of the booking process and/or payment.

A system-generated login and password can also be included, should the participant wish to make any changes to their registration.

Post Conference, there is a need to provide certificates, when requested, to prove general attendance and to delegates who have worked as volunteers as a thank you.

#### 3. Delegate Communication

Communication with participants to be managed directly from the online system. This should be done via a dedicated registration email and include an option for both mass mailing and individual communication with delegates.

The registration support team on the Service Partner side shall manage communication, including:

- Post registration changes and re-confirmation
- Payment queries
- General event queries from participants based on the conference guidelines
- Mass emailing of joining instructions or any other mass email campaign required by the conference Secretariat (payment reminders, registration reminders, key deadlines notifications etc.)

#### **4. Financial management**

Delegate payments and refunds shall be processed and managed via the proposed online payment gateway (Stripe).

#### **5. Union account integration**

Working closely with the Registration Manager and the Union's HQ Accounts team to ensure that all Union accounts processes and requirements are integrated and met through carefully devised 'back office' systems.

#### **6. Administration, reporting and event management**

The system shall include a full package of administration tools (i.e. managing records by various statuses, categories, sorting / filtering data, extract data with new entries identified etc.), and should produce a variety of reports.

Of particular relevance for the accounting and reporting systems is that, once the periodic report is produced, no additional entries on the previous period may be allowed (e.g. once the period from May 18 and May 25 is concluded, no additional bookings can be made between those dates).

The system also must allow a data extraction within a date range (between XX and YY dates).

The Conference Team must also be able to add an unlimited number of system users, with specific user permissions, to manage and administer the registrations if required. We will need full admin rights for at least one key member of The Union team.

#### **7. Technical requirements and GDPR**

There are a number of technical requirements including compliance with standards, data integrity and security, and hosting. For more details on technical requirements, please see the appendix at the end of this document.

#### **8. Data governance**

The Union requires an authentication process against its user database. This can be performed via an API or a synchronisation or a direct access to the database.

The Union requires to have each user recorded in its user database. This can be performed via an API or a synchronisation or a direct access to the database.

The Union requires to have each user session activity /abstract in its user database. This can be performed via an API or a synchronisation or a direct access to the database.

The Union requires a full access to the back office in order to access in real time all data values.

## **9. GDPR**

Where processing of personal data is to be carried out, the Service Provider must guarantee to implement appropriate technical and organisational measures to ensure that they meet the requirements of the European General Data Protection Regulation (EU Regulation 2016/670) and ensure the protection of the rights of the data subject as stipulated in Article 28 of the regulations.

Furthermore, the Contractor shall not engage any sub-processor without the prior specific written authorisation of The Union.

The Contractor must delete or return all personal data to The Union as requested at the end of the contract.

The Union must also agree to any privacy policy and marketing permissions that users are asked to sign. Where possible, users should have the option to sign up to marketing from The Union. The language and technical specifications of this should be agreed with The Union Conference team.

## **10. Database Integration:**

The proposed system must have seamless synchronisation with The Union's internal systems, including Single Sign-On (SSO) capabilities

## **11. Onsite System**

A special database and the interface (front end and back end) to manage onsite registration should be provided for fast check in and onsite badge printing.

This onsite data base/interface shall be fully integrated with the registration system as well as provide unlimited number of individual logins for conference staff/volunteers operating onsite.

## **12. Designing and printing badges and tickets**

The system should be able to lay out and pre-print all badges including barcodes or QR codes, and all personalised event materials such as tickets to any conference events. The design of these materials must be completed and signed off by The Union's communications team.

## **13. Onsite Capacity to include**

- **Print-on-Demand Badges:** Instant printing of full-colour, double-sided badges. Designs must be differentiated by attendee type and of high quality, as specified and reviewed by the Union team. The system should be able to print on-demand badges and tickets and include the badge printing equipment and supplies. Mock up samples to be shared prior to the event and for all the event categories for final approval.

- Each participant shall receive an automated email confirmation that contains a barcode or QR code. Upon arrival to the event registration, the participant shall present the barcode to be scanned in order to receive their badge and any other printed materials.
- Self-Scan Check-In Kiosks: Provision of QR-code-based scanning stations for a contactless and rapid arrival.
- Materials Distribution: Coordination of lanyards and conference bags.
- Technical Help Desks: Dedicated stations for troubleshooting, name corrections, and on-site registrations.
- Hardware & International Logistics: Provision of all necessary hardware and management of freight, including ATA Carnets and customs clearance for equipment entering Brazil.
- Badge screening/scanning capacity: attendees tracking through the Event through scanners or other tracking equipment and badge scanner option for exhibitor usage

#### **14. Staffing and Training**

- **Staff Coordination:** Management of registration personnel (local hosts) and local multi-lingual volunteers.
- **Training:** Conduct a mandatory on-site training session prior to the conference opening, covering platform usage, venue orientation, and delegate flow management.
- **Uniform Standards:** All staff must adhere to the professional dress code as shared by The Union in advance of the event

#### **Possibility of auditing**

The Union reserves the right to mandate an audit of any kind regarding this invitation to tender. This audit may be carried out either by The Union employee or by entities mandated by The Union to do so.

The Union will inform the Provider beforehand of this audit with a minimum notice of five working days. The Provider shall assist in carrying out such audits.

The technical solution must above all cover a broad spectrum of defined functional and organisational needs. It must also respect the following prerequisites:

#### ***Version upgrade management***

The production of a new version of the software must be done in the most transparent way possible. In particular, the technical modifications of the site (for example corrections of anomalies) must integrate without jeopardising the integrity of the site's content or functions.

The Provider will describe precisely the process followed during an upgrade of the site.

In particular, they will explain how changes made to the production version (new content, changes to existing content, etc.) will be included in the new version and will specify, if need be, how long the site will be offline.

#### ***Quality of service requirements***

The provider must detail the technical architecture of the solution, but The Union reserves the right to choose a technical architecture.

**Availability**

Availability	Level of availability of the target on a monthly basis.
24/24; 7 days a week Hourly range: 24h - 24h	99%

Although use of the software is expected to be relatively constant over the year, peaks can be observed in response to current events.

For example, around a specific application deadline we might expect to have an increased average attendance by a factor of over 6.

Knowing that backups of applications (database and file system) are performed daily, the Provider will suggest backup solutions to provide the minimum durations of data loss:

- Any incident, except in the case of a major disaster: loss of data < one hour.
- Any major disaster: loss of data <= one working day.

**Response time**

As part of its commitments to service quality, the Service Provider is in charge of setting up a monitoring system guaranteeing the prevention of performance degradation.

The architecture suggested must be able to absorb the increase in load resulting from the progressive increase in the number of connected Internet users expected.

The Service Provider will therefore detail in the most precise way its commitments in terms of response time for a "normal" use with a standard number of connected Internet users.

The technical environment will consist of servers allowing testing before the new evolutions go online, according to a three-tier organisation:

Environment	Description
<b>Development Environment</b>	Managed by the Provider This environment should be accessible in a secure manner by The Union (e.g. pre-VA tests) It will be possible to access some third party services for testing (Pure test player)
<b>Qualification Environment</b>	Managed by the hosting provider Used for deliveries for validation and production preparation. Enables testing of services when needed
<b>Production Environment</b>	Managed by the hosting provider

**Data integrity and security**

The Provider will be responsible for the security of the data managed by the web site in case of attacks from the network or the exploitation of security breaches.

The Provider will be responsible for defining, designing and validating all procedures for backing up, archiving and restoring data.

The Provider will also be a consultant for the implementation of procedures preventing the access of the web site from robots (detection, limitation of access ...)

These procedures will be designed to meet the availability requirements.

### ***Responsive design***

The Service Provider will specify how the completion of the entire web site that it proposes meets the requirements of Responsive Design to facilitate use of the site from different devices (desktop, tablets, mobile and other emergent devices).

The Provider shall specify in particular its commitments in support of these terminals. In particular it will specify the availability of its solution on the platforms currently in production, and in particular on the most popular smartphones and tablets.

### **Workstation requirements**

#### **Technical Requirements**

Delegates need to log in to the system using a username and password as well as Union SSO. The registration platform also needs to communicate with the Union Membership API to validate their membership and allow members to receive the membership price rate.

#### **Screen Resolution**

The website should be optimised for a minimum desktop resolution of **1280 × 768 pixels**. The site must follow **Responsive Web Design** principles, ensuring proper display across mobile, tablet, desktop, and large monitor screens.

#### **Responsive Design**

The website should follow a **mobile-first approach**, allowing the interface to adapt to different screen sizes and orientations.

Supported device widths include:

Mobile devices: **320px and above**

Tablets: **768px and above**

Desktop screens: **1280px and above**

#### ***Browser compatibility***

The site must be fully functional and tested on the latest stable versions and the immediately preceding major versions of the following widely used browsers:

- The website must support the latest stable versions of the following browsers:
- Windows Internet Explorer: **11.0 and higher**
- Mozilla Firefox: **43.0 and higher**
- Google Chrome: **47.0 and higher**
- Apple Safari: **5.1 and higher**

### **Applicable Standards**

#### **Web Standards**

The website must comply with modern web development standards, including **HTML5, CSS3, and modern JavaScript**.

**Accessibility**

The website should comply with **W3C WCAG 2.0 Level AA accessibility guidelines**, including keyboard navigation, proper colour contrast, and screen reader compatibility.

**Hosting**

The server infrastructure should be provided and managed by the service provider, and it must be hosted within Europe to ensure full compliance with GDPR requirements. The vendor must also ensure proper load balancing and scalability to handle peak traffic during critical periods.

**Reversibility**

In the event of termination of the contract between the successful provider and The Union, for any reason whatsoever, the Provider must commit, under the following conditions, to ensure the reversibility of the web site in order to allow The Union to have it taken over by a third party.

At the end of this contract, the Provider provides assistance to The Union (or an operator mandated by The Union) to ensure a transition to a new support.

During the reversibility period:

- The Provider will carry out the activities assigned to it as part of the transition with the teams that will take over the Service and will operationally train the new teams on the functionalities and characteristics of the web site;
- The service shall continue to be provided under the terms and conditions set out in this Framework Agreement;
- The Provider shall not in any way modify or reduce its services and obligations;
- The Provider must commit to cooperate loyally with the third party who will take over the Service.

From the start of the project, the owner initiates a reversibility plan.