

Invitation to Quote

YOU ARE HEREBY INVITED TO QUOTE FOR REQUIREMENTS LISTED IN THIS DOCUMENT

**Quote Number NRF/SAASTA/13/2018-2019**

SHORT DESCRIPTION OF REQUIREMENT

Appointment of a Service Provider to Conduct an Impact Study on the Science & Technology Youth Journalist Programme

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| **INVITATION TO QUOTE (SBD 1A)** | | | | |
| Quote **Number** | | | **NRF/SAASTA/13/2018-2019** | |
| **Closing Date and Time (as per NRF systems)** | | | **08/02/2019 at 11:00 a.m** | |
| HIGH LEVEL SUMMARY OF REQUIREMENTS | | | | |
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| response documents are delivered to: | | | | |
| **PHYSICAL ADDRESS:**  211 Nana Sita Street, Didacta Building, Pretoria, 0001  Tender box : Opens 24 hours  Working hours: 08h00-16h30 on weekdays  **GPS coordinates**  Latitude *-25.75118 "S*  *Longitude 28.189232 "E*  **Dimensions of tender box opening**  10 cm X 40 cm | | **ADDRESSED AS FOLLOWS:**  *On the face of each envelope, the Bid Number and Bidder’s Name, Postal Address, Contact Name, Telephone Number and email address should be indicated.* | | |
|  | | EMAIL DELIVERY AS FOLLOWS:  NOT ACCEPTABLE | | |
| **Bidding procedure enquiries may be directed in writing to:** | | **Technical information may be directed in writing to:** | | |
| Section | SCM | Section | | SAASTA: Monitoring & Evaluation |
| Contact person | Mr Tshepo Matheane | Contact person | | Mr Rofhiwa Raselavhe |
| E-mail address | tshepo@saasta.ac.za | E-mail address | | [rofhiwa.raselavhe@saasta.ac.za](mailto:rofhiwa.raselavhe@saasta.ac.za) |

| SUPPLIER INFORMATION | | | | | | | | | | | | | |
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| **Name Of Bidder** | | | | | | | | | | | | | |
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| **Postal Address** | | | | | | | | | | | | | |
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| **Street Address** | | | | | | | | | | | | | |
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| **Telephone Number** | | | | | | | | | | | | | |
| Code | |  | | Number | | | |  | | | | | |
| **Cell Phone Number** | | | | | | | | | | | | | |
| Code | |  | | Number | | | |  | | | | | |
| **Facsimile Number** | | | | | | | | | | | | | |
| Code |  | | | Number | | | |  | | | | | |
| **E-Mail Address** | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | |
| **VAT Registration Number** | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | |
| **Tax Compliance Status** | | | Tax Compliance System PIN | | |  | | | OR | Central Supplier Database No. | | | MAAA |
| **B-BBEE Status Level Verification Certificate** | | | | | Tick Applicable Box. ❑ Yes ❑ No | | | | | **B-BBEE Status Level Sworn Affidavit** | Tick Applicable Box. ❑ Yes ❑ No | | |
| **[A B-BBEE status level verification certificate/ sworn affidavit (for EMEs & QSEs) must be submitted in order to qualify for preference points for B-BBEE]** | | | | | | | | | | | | | |
| **Are you the accredited representative in South Africa for the goods /services/works offered?** | | | | | | | ❑ Yes ❑ No [If yes enclose proof] | | **Are you a foreign-based supplier for the goods/services/ works offered?** | | | ❑ Yes ❑ No [If yes, answer the questionnaire below] | |
| QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS   |  |  | | --- | --- | | Is the entity a resident of the Republic of South Africa (RSA)? | ❑ Yes ❑ No | | Does the entity have a branch in the RSA? | ❑ Yes ❑ No | | Does the entity have a permanent establishment in the RSA? | ❑ Yes ❑ No | | Does the entity have any source of income in the RSA? | ❑ Yes ❑ No | | Is the entity liable in the RSA for any form of taxation? | ❑ Yes ❑ No |   If the answer is “No” to all of the above, then it is not a requirement to register for a tax compliance status system pin code from the South African Revenue Service (SARS) and if not register as per 2.3 below. | | | | | | | | | | | | | |

| TERMS AND CONDITIONS FOR BIDDING (SBD 1B) | | | | |
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| 1. **BID SUBMISSION:** | | | | |
| |  |  | | --- | --- | | 1.1 | Bids must be delivered by the stipulated time to the correct address. Late bids will not be accepted for consideration. | | 1.2 | All bids must be submitted on the official forms provided–(not to be re-typed) or in the manner prescribed in the bid document. Bid pages are bound to minimise risk of lost pages. | | 1.3 | This bid is subject to the Preferential Procurement Policy Framework Act, 2000 and the Preferential Procurement Regulations, 2017, the General Conditions Of Contract (GCC) with its special conditions of contract, and, if applicable, any other legislative requirements. | | 1.4 | The successful bidder will be required to fill in and sign a written contract form (SBD7). | | | | | |
| 1. **TAX COMPLIANCE REQUIREMENTS** | | | | |
| |  |  | | --- | --- | | 2.1 | Bidders must ensure compliance with their tax obligations. | | 2.2 | Bidders are required to submit their unique personal identification number (PIN) issued by SARS to enable the organ of state to verify the taxpayer’s profile and tax status. | | 2.3 | Application for tax compliance status (TCS) pin may be made via e-Filing through the SARS website www.sars.gov.za. | | 2.4 | Bidders may also submit a printed TCS certificate together with the bid. | | 2.5 | In bids where consortia / joint ventures / sub-contractors are involved, each party must submit a separate TCS certificate / PIN / CSD number. | | 2.6 | Where no TCS is available but the bidder is registered on the Central Supplier Database (CSD), a CSD number must be provided. | | 2.7 | No bids will be considered from persons in the service of the state, companies with directors who are persons in the service of the state, or close corporations with members persons in the service of the state. | | | | | |
| 1. **TWO ENVELOPE SYSTEM** | | | Yes | |
| 1. **VALIDITY PERIOD FROM DATE OF CLOSURE** | | | | 150 days |
| 1. BRIEFING SESSION OR SITE VISIT DETAILS | | | | |
|  | Attendance: | Compulsory | | |
|  | Date and Time: | 25 January 2019 | | |
|  | Venue: | Didacta Building, Pretoria | | |
|  | Address: | 211 Nana Sita Street, Pretoria | | |
|  | **Contact Person:** | Mr Rofhiwa Raselavhe | | |
| 1. THE BIDDING SELECTION PROCESS | | | | |
|  | **Stage 1 – Compliance to submission requirements**  Bidders warrant that their proposal document has, as a minimum; the specified documents required for evaluating their proposals as set out in the Returnable Document List and conform to all the terms, conditions, and specifications as set out in this document. | | | |
|  | **Stage 2 – Evaluation of Bids against Technical Specifications**  **Bidders achieving the minimum threshold in the specification to enter the Price/Preference scoring stage:** | | | |
|  | Stage 2A – Evaluation of Bids against Specifications including Quality  The NRF evaluates each bidder’s written response to the specifications issued in accordance to published evaluation criteria set out in this document. | | | |
|  | Stage 2B – Due Diligence Interviews or Proof of Delivery/Concept against Specifications  Where circumstances justifies it, the NRF conducts interviews with shortlisted bidders for them to present further information or provide further proof to the evaluation committee. In these cases, the National Research Foundation provides the areas of concern to the short listed bidders to address in their presentations with this document and, where necessary, may provide further areas of concern to the short listed bidders at this stage. | | | |
|  | Stage 2C – Due Diligence Research  The National Research Foundation confirms the recommended bidder(s)’s reference letters with referees to confirm the recommendation(s). | | | |
|  | **Stage 3 – Price/Preference Evaluation**  Basis of fair competition:  The NRF compares each bidder’s pricing proposal on an equal and fair comparison basis equitable to all bidders, taking into account all aspects of the bid’s pricing requirements including the application of fair pricing tests as set out below in the section “Insufficiency of Funds”.  Ranking of the bidders pricing:  The NRF ranks the qualifying bids on price with lowest priced Bid receiving the maximum points (either 80 or 90) and the remainder ranked in relation to the lowest priced bid. The NRF adds the bidders’ claimed preference points as verified to the submitted preference claim form (SBD 6.1) to provide the final ranking for the award decision. | | | |
|  | **Stage 4 – Checking Tax Compliance** | | | |
|  | Stage 4A – Taxpayers Resident in South Africa  The NRF notifies the recommended bidder in writing where their tax compliance check reflects that they are non-compliant and provides the recommended bidder seven (7) working days to submit written proof from SARS of their tax compliance status or proof that they have made an arrangement with SARS to meet their outstanding tax obligations. Failure to deliver such written evidence of compliance results in the rejection of that recommended bid. | | | |
|  | Stage 4B – Non-Resident Foreign Bidders  Where foreign bidders are submitting a bid, they complete all sections of the SBD1 especially the tax questionnaire. The NRF submit the Foreign Bidder’s completed SBD1 to the South African Revenue Service to obtain from the South African Revenue Service the Confirmation of Tax Obligations letter. Where South Africa Revenue Services does not issue the letter, Stage 4A applies in clearing the reason for not receiving the letter. | | | |
|  | **Stage 5 – Award and Contract Signing**  The NRF nominates the bidder with the highest combined score for the contract award subject to the bidder having supplied the relevant administrative documentation. | | | |
| 1. **ACKNOWLEDGEMENT OF READING EACH PAGE** | | | | |
| The bidder warrants by signature in this document that the bidder has read and accepts each page. | | | | |
| 1. **CENTRAL SUPPLIER DATABASE REGISTRATION** | | | | |
| Bidders are requested to register on the Central Supplier Database and to include in their bid their Master Registration Number (Supplier Number) in order to enable the NRF to verify the supplier’s tax status on the Central Supplier Database. | | | | |

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| 1. **CLARIFICATION** |

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| If the respondent wishes to clarify aspects of this request or the acquisition process, they contact the officials listed under the enquiries section above. The National Research Foundation does not provide the origin of the request to any party. |

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| 1. **RESPONSE PREPARATION COSTS** |

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| The NRF is not liable for any costs incurred by a bidder in the process of responding to this Bid Invitation, including on-site presentations. |

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| 1. **TWO ENVELOPE SYSTEM** |

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| The NRF, in the interests of transparent procurement, utilises the two-envelope system to minimise any form of price bias in the technical selection phase (the first envelope) as the evaluators receive the price details (the second envelope with the SBD 3 (price summary schedule and detailed supporting pricing documentation) for price evaluation after completion of the technical selection stages. An outer envelope addressed as stated in this document encloses both envelopes. |

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| 1. **COLLUSION, FRAUD AND CORRUPTION** |

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| Any effort by Bidder/s to influence evaluation, comparisons, or award decisions in any manner will result in the rejection and disqualification of the bidder concerned. |

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| 1. **FRONTING** |

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| The NRF, in ensuring that bidders conduct themselves in an honest manner will, as part of the bid evaluation processes where applicable, conduct or initiate the necessary enquiries/investigations to determine the accuracy of the representation made in the bid documents. The onus is on the bidder to prove that fronting does not exist, should the National Research Foundation establish and notify the bidder of potential breaches of any of the fronting indicators as contained in the Department of Trade and Industry’s “Guidelines on Complex Structures and Transactions and Fronting”. Failure to do so within a period of 7 days from date of notification will invalidate the bid/contract and may also result in the restriction of the bidder to conduct business with the public sector for a period not exceeding 10 years, in addition to any other remedies the NRF may have against the bidder concerned. |

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| 1. **DISCLAIMERS** |

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| The NRF has produced this document in good faith. The NRF, its agents, and its employees and associates do not warrant its accuracy or completeness. The NRF makes no representation, warranty, assurance, guarantee or endorsements to any provider/bidder concerning the document, whether with regard to its accuracy, completeness or otherwise and the NRF shall have no liability towards the responding service providers or any other party in connection therewith. | |
| 1. CANCELLATION OF THE QUOTATION PRIOR TO AWARD | |
|  | Procurement not required: The NRF cancels the Bid Invitation prior to making an award if due to changed circumstances there is no need for the specified procurement in the document. |
| No Acceptable Quotations: The NRF cancels the Quotation Invitation prior to making an award if it receives no acceptable bids i.e. that do not meet the minimum requirements set out in this document. |
| Invalid Bid Procedure: The NRF cancels the Quotation Invitation prior to making an award if a material irregularity occurred in the bid process. |
| Insufficiency of Funds at date of Award: The NRF cancels the Quotation Invitation prior to making an award if the funds are no longer available to cover the total estimated contract value at the date of the evaluation. |
|  | Quoted Prices are within a fair price range: The NRF cancels the Quotation Invitation where the offered price is defective as being too low or too high to the identified fair price range. The NRF conducts fair pricing tests to arrive at an opinion of reasonableness of the offer price. Where these tests reflect pricing outside of the established fair price range, the evaluators may recommend price negotiation and no other component. The NRF starts negotiation with the winning bidder or, where that bidder refuses negotiation, with the next ranked bidder in the price/preference ranking until a market related price is achieved. |
| SBD 1 SIGNATURE | |
| **NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.** | |
| **SIGNATURE OF BIDDER:** | |
| **CAPACITY UNDER WHICH THIS BID IS SIGNED**  (Proof of authority must be submitted e.g. company resolution**)** | |
| **DATE:** | |

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| SCOPE OF WORK |
| INTRODUCTION TO THE NRF |
| The National Research Foundation Act, Act 23 of 1998, establishes the National Research Foundation (“NRF”) as the juristic person that makes this bid invitation and will contract with the awarded bidder. The Public Finance Management Act classifies the organisation as a Schedule 3A Public Entity. |
| CONTEXT OF THIS PROCUREMENT |
| The Department of Science and Technology (DST) as part of its contribution to the implementation of the Comprehensive Rural Development Programme, tasked the South African Agency for Science and Technology Advancement (SAASTA) in 2016 to implement the Science and Technology Youth Journalist Programme (STYJ) in support of the Innovation Partnership for Rural Development Programme (IPRDP). In line with the Science Engagement Strategy (available on SAASTA website - <http://www.saasta.ac.za/saasta_wp/wp-content/uploads/2018/10/2015-Science-Engagement-Strategy.pdf> )[[1]](#footnote-1), strategic aim one (1) of the National Research Foundation Strategy :2020 which aims to; promote globally competitive research and innovation, promote globally competitive research and innovation, enhance strategic international engagements and to provide best practice systems in support of grant making, reviews and evaluations.[[2]](#footnote-2) The STYJ programme aims to popularise science, technology and innovation and contribute to improving public understanding and awareness of science and technology.  The project also addresses strategic aim two (2) that focuses on the establishment and maintenance of research infrastructure and platforms and strategic aim four (4) which focuses on entrenching science engagement in order to develop a scientifically literate and engaged society[[3]](#footnote-3) by ensuring high quality science communication and profiling of South African science and science achievements.  SAASTA as mandated by the DST requires that an impact assessment study is conducted on the STYJ programme in order to track progress made to date and measure the effectiveness of project in relation to its objectives. |
| CONTRACT PERIOD |
| The contract period for this bid is seven (7) months. |
| DETAILED SPECIFICATION |
| 1. **Background**   The Department of Science and Technology in support of the Comprehensive Rural Development Programme, tasked the South African Agency for Science and Technology Advancement in 2016 to implement the Science and Technology Youth Journalism programme in support of the Innovation Partnership for Rural Development Programme (IPRDP). This programme broadly intended to gather knowledge, evidence and learning for integrating innovative technologies in improving access and quality of public service delivery.  The programme primary seeks to develop the science journalism skills of the interns and to create capacity in the community media for covering science and technology stories.  SAASTA is a business unit of the National Research Foundation (NRF) with the mandate to advance public awareness, appreciation and engagement of science, engineering and technology in South Africa.  SAASTA’s contribution to the NRF’s vision is to grow the pool of quality learners today who will become the scientists and innovators of tomorrow.   * 1. **Objectives of the STYJ programme**   The expected out comes of the project are:   * + 1. Development of basic science journalism skills in the youth and enhanced career opportunities.     2. Enhanced interest in science and technology in local communities and the recognition of indigenous and grassroots innovation existing in communities.     3. Enhance the understanding of the importance of science and technology reporting in community media organisations.     4. Communication of specific demonstrated DST-funded technologies and general science stories in a variety of languages to local communities.   Due to the success and value added by the youth science and technology programme, it has now expanded to seven of the nine province and in 2019 will expand to have a fully national footprint.   1. **Scope of Work for the STYJ Programme Impact Assessment Study**    1. **Objectives**   The appointed service provider must undertake an impact evaluation on the STYJ programme which ensures the following objectives are achieved:   * + 1. **Young Science and Technology Journalism Project Interns** * **To develop skills in science journalism** * Establish whether the programme has contributed to the development of science journalism skills for science graduates. * Establish whether the programme has contributed to the development of science journalism skills for journalism and communications graduates. * **To develop interest in science journalism** * Establish whether the science graduates have developed interest in science journalism after participating in the STYJ programme. * Establish whether communications and journalism graduates developed interest in science journalism after participating in the STYJ programme. * **To improve the employability of STYJ programme participants** * Establish whether the participants in the programme have gained access to employment due to their involvement in the programme and the nature of this employment. * **To retain the STYJ programme interns in science communication sector** * Establish whether the previous interns have pursued science engagement related work/employment after the completion of the internship programme. * Establish whether the previous interns are involved in science engagement entrepreneurship after the completion of the internship. * **STYJ programme training workshops** * Establish whether the STYJ programme training workshops have equipped the communication and journalism graduates with science journalism skills prior to their deployment at the participating community print and broadcasting. * Establish whether the STYJ programme training workshops have equipped the science graduates with science journalism skills prior to their deployment at the participating community print and broadcasting * **Networking Opportunities** * Did the interns establish any professional networks while participating in the YJST programme? * Establish whether the programme has created or improved the awareness of science & technology and the National System of Innovation (NSI) for journalism and communications graduates.   + 1. **Participating Community Print and Broadcast Media Houses** * Media Coverage * Establish whether there was change in science and technology reporting prior and beyond the introduction of STYJ programme at the participating community print and broadcast media houses. * Establish the quantity of science and technology reporting through broadcast programmes and print media publications from the participating community print and broadcast media. * Conduct a comparative analysis between participating and non-participating community media houses. * Establish whether there was national media coverage of science content as a result of the STYJ programme. * Establish whether the participating Community Print and Broadcast Media Houses developed an interest in introducing science content in their programming or editorial content and whether this has translated into changes in the media house operations. * Establish the scientific accuracy and journalist quality level of science & technology content reported by the previous intern through the community print and broadcast media. * Calculate, with evidence, the Advertising Value Equivalency (AVE) cost based on the media generated through the STYJ programme. * Establish whether there was other value-add activities to the participating community print and broadcast media houses by the previous interns.   + 1. **Community awareness of Science & Technology** * Establish the level of awareness on science and specifically the IPRDP project (where relevant) in the communities based on media coverage generated through the participating community print and broadcast media houses. * Accurately quantify the number of community members who have been impacted by science-based media generated through the programme. * Establish whether the use of indigenous languages in science reporting through the participating community print and broadcast media has improved the understanding and accessibility of science content to the local communities   1. **Participating District Municipalities**   The impact assessment should be conducted in the district municipalities where the programme has been implemented.  Below are the Participating District Municipalities:   |  |  | | --- | --- | | **District Municipality** | **Participating Community Media House (s)** | | **Eastern Cape Province** | | | Alfred Nzo District Municipality | Alfred Nzo FM | | Amathole District Municipality | Kumkani FM | | Oliver Tambo District Municipality | Inkonjane FM | | Amathole District Municipality | Rainbow News | | **Gauteng Province** | | | City of Tshwane | Mams FM and TUT FM | | City of Johannesburg | Voice of Wits and Thetha FM | | **Limpopo Province** | | | Capricorn District Municipality | Seipone newspaper and Nthavela community newspaper | | Sekhukhune District Municipality | Sekhukhune FM | | Vhembe District Municipality | Makhado FM and Univen FM | | **Kwa-Zulu-Natal Province** | | | King Cetshwayo (uThungulu) District Municipality | 1KZN Community Television | | uMgungundlovu District Municipality | uMgungudlovu FM | | uMnambithi District Municipality | Inhloso yesiZwe | | uMnambithi – District Municipality | Nqubeko FM | | eThekwini Metropolitan Municipality | EzakwaZulu News based in Pinetown | | **Mpumalanga Province** | | | Ehlanzeni District Municipality | Bushbuckridge Community Radio | | Gert Sibande District Municipality | Voice of Community FM | | **Northern Cape Province** | | | Frances Baard District Municipality | The Northern Express in Kimberley | | Namakwa District Municipality | Namakwa FM | | **North West Province** | | | Bojanala Platinum District Municipality | Mafisa Community Radio in Rustenburg | | Dr Ruth Segomotsi Mompati District Municipality | Vaaltar Community Radio | | Madibeng *Local Municipality* | Lethlabile Community Radio | |  | |  1. **Specifications**    1. **Research design and methodology**       1. The service provider will be expected to produce a study that is based on methodological rigor and statistical representativeness.       2. All the YSTJ project from the participating district municipalities from the seven provinces namely: should be included in the sampling framework and sampling should be reflective of demographics and population patterns / distribution in each province.       3. The data analysis programme that will be used for data capturing and analysis should be clearly stated.       4. The database of interns that participated in the programme over the course of three years will be supplied by SAASTA.       5. The appointed service provider should minimise the use of jargon.    2. **Ethical considerations and consent**       1. The service provider should adhere to acceptable research ethical considerations    3. **Data management and archiving**       1. All completed questionnaires must be submitted to SAASTA for safekeeping.       2. Complete source documents such as data sets, code books and the research tool used must be submitted.    4. **Implementation and quality control**       1. A quality control strategy should be included in the project plan.    5. **Presentations, reporting and timeframes**       1. The service provider will be expected to present a project plan and deliverables according to timeframes, as well as the research tools upon awarding of the contract.       2. Reports should be written in rich and explanatory fashion that would enable individuals from non-social scientific backgrounds to clearly understand the information provided.       3. Reports have to be presented in a neat, edited and professional format.       4. The service provider has to ensure that all content and statistics presented are accurate.       5. Should mistakes be identified, it will be the responsibility of the service provider to rectify reports,       6. All reports will be evaluated by SAASTA internally.   Table 2 : Outline of the Reporting timeframes:   |  |  |  | | --- | --- | --- | | **No.** | **Deliverable** | **Time/Duration** | | 1. | Presentation of the detailed project plan including the literature review, methodology and research tools | Upon awarding of contract | | 2. | Ongoing Progress reports | Monthly progress reports after awarding of the contract | | 3. | First submission of draft report | TBA | | 4. | Submission and presentation of the final report | TBA |  * + 1. All reports will be submitted in editable soft copy format and one (1) hard copy.     2. The final product belongs to SAASTA.   1. **Outline of the expected deliverables**  |  |  | | --- | --- | | **No** | **Deliverable** | |  | Submission and presentation of the project plan, including literature review, methodology and research tools | |  | Submission of on-going progress reports | |  | Submission of the first submission of draft report | |  | Submission and presentation of final report including source documents such as data sets, transcripts and code books. |  * 1. **Important for note for the Service Providers :** * The service provider must ensure that the reported information provided is complete and accurate. Any corrections required would be done without any cost to SAASTA. * Research methodology, theoretical framework and reporting must be scientifically correct and acceptable * The service provider must have a minimum of three years’ experience in conducting impact assessment or similar studies  1. **After Contract Completion Services**   Service levels agreed to are as follows:   * 1. The service provider must accept responsibility for reports until a year after completion of the contract and submission of the final reports.   2. The service provider must ensure that the reports are accurate and correct. Should mistakes be identified, it will be up to the service provider to rectify the reports and provide a new set of reports in hard and soft copy format, as well as adjusted data sets.   3. The service provider should respond to any queries within twenty four hours.   4. All associated costs related to data collection, analysis and reporting must be included in the costing of this tender.   5. Evaluation of expected outcomes and deliverables will be conducted by SAASTA internally.   6. The Corporate Communications unit at SAASTA should be consulted with regards to the branding of reports.  1. **Evidence of Supply Capability (Technical Merit)**   Bidders are required to provide three (3) written references from previous clients   1. **Selection and Awarding of Contract**   This Bid is evaluated through a two-stage process.  **Stage 1 – Selection of Qualified Bidders**  The Bidders’ Bid response/submission is evaluated against the Bid invitation specifications.  Evaluation is made in accordance to published evaluation criteria and the scoring set.  **Stage 2 – Awarding of the Contract**  Bidders are compared on a fair and equal basis taking into account all aspects of the proposals.  The award criteria are:  **Price** - with the lowest priced Bid on an equal and fair comparison basis receiving the highest price score as set out in the 2017 Preference Regulations.  **Preference** - preference points as claimed in the preference claim form are added to the price ranking scores and the highest combined score is nominated for the contract award.  **Administration** - Contracts are awarded where Bidders have supplied the relevant administrative documentation, especially the Tax Certificate.   1. **Qualifying Thresholds for Selection (Stage 1) Evaluation**   Bids scoring less than the minimum threshold of 70% per each criterion and, where GO/NO GO scoring is applied, scores of “NO GO” are marked as failed and are not considered for the next stage of evaluation   1. **Selection on Specifications and Capabilities and Capacities**   Evaluation scoring for all criteria other than “GO/NO GO” are scored on the following basis:   |  |  |  |  |  | | --- | --- | --- | --- | --- | | 0 | 1 | 2 | 3 | 4 | | No Information to make assessment | Poor | Average | Meets Requirements | Exceeds Requirements |   Total Evaluation Score .= [Score x weighting x No. of Evaluators]/[Maximum Score x 100 x No. of Evaluators]   |  |  |  | | --- | --- | --- | | **SELECTION CRITERIA** | | | | **Section A : GO/NO GO** | | | | **NO.** | **ELEMENT** | **WEIGHT** | | 1 | Three years’ relevant experience in programme impact evaluation. | GO/NO GO | | 2 | The bidder addressed the scope of work adequately and accurately in the proposal | GO/NO GO | | 3 | Three Contactable References | GO/NO GO | | **Section B: Evidence Scoring** | | | | **NO.** | **ELEMENT** | **WEIGHT** | | 4 | **The company has the capacity and capability to undertake the scope of work.**  0 = No information provided in the proposal detailing the team leader’s experience relevant to the scope of work.  4 = Team leader has three years’ experience relevant to the scope of work | 30 | | 5 | **Details of three (3) contactable references.**  0 = One or less contactable references provided  3 = Two contactable references relevant to the scope work and one contactable of previous research work provided.  4 = Three or more contactable references relevant to the scope of work provided | 15 | | 6 | **Evidence in project proposal of experience in conducting research/or studies in the media landscape**  0 = No information provided in the project proposal of the service provider’s experience in conducting research /or studies in the media landscape.  3 = Information provided in the project proposal of the service provider’s experience in conducting impact evaluation work in the media landscape.  4 = Information provided in the project proposal of the service provider’s plan to conduct the research in all required municipalities. | 40 | | 7 | **Evidence in project proposal of municipal coverage**  0 = No information provided in the project proposal of the service provider’s plan to conduct the research in required municipalities.  3 = Information provided in the project proposal of the service provider’s plan to conduct the research in all required provinces.  4 = Information provided in the project proposal of the service provider’s plan to conduct the research in all required municipalities. | 15 | |  | | |  1. **Contract Management**   The award of this contract to the selected supply provider establishes the contract between the NRF and the appointed supply provider. The contract is inclusive of potential downstream work as specified in this document where the nature and quantity of supplies are not determinable at the commencement of this contract and variable delivered quantity where the exact supplies are specified at the commencement of this contract except for quantities and date of delivery. Such potential downstream supplies follows the process of a detailed quotation of the supply required, evaluation of the supply quotation received and, where necessary, request either further detail or negotiate upon value of supply quoted and the issue of an official Purchase Order for the agreed supply prior to the commencement of such supply. Variable delivered supply follows the process of issuing a detailed official Purchase Order specifying the exact description including catalogue numbers and unit pricing as in this contract as well as the quantity, date of the required delivery and location of the delivery. Variable delivered supply generates a stream of “call off” instructions as and when the NRF requires these the contracted supplies.   1. **Contract Period**   The contract will commence with immediate effect upon the signing of the Acceptance of Written Offer and will continue for a period of seven (7) months.   1. **Supply Delivery Validation**   The certificate and the related report of delivery/installation/progress milestone/commissioning will be validated by a NRF representative prior to payment of final invoices.   1. **Payment Intervals**   The NRF undertakes to pay delivery validated invoices in full within thirty (30) days from the monthly statement date or upon agreed payment intervals as accepted in this contract. Payments will be done according to the table below. After a milestone has been reached the Service Provider will be paid within 30 Days of SAASTA receiving a valid Invoice.  Table Five: Payment intervals   |  |  |  | | --- | --- | --- | | **No** | **Deliverable** | **Percentage** | |  | Submission and presentation of the draft report | 10% | |  | Submission of the final report | 90% |  1. Pricing schedule for the Duration of the Contract (Standard Bidding Document 3.1 and 3.3)  |  | | --- | | NOTE Only firm prices will be accepted. The price quoted is fully inclusive of all costs and taxes. No changes or extensions or additional ad hoc costs are accepted once the contract has been awarded | | Detailed information is optional and is provided as annexures to the details provided below. | | Bid price in South African currency, foreign exchange risk is for the account of the Bidder. | | Pricing is subject to the addition of Preference Points as stipulated in the section below - Standard Bidding Document 6.1 Preference claim form |   OFFER TO BE VALID FOR 150 DAYS FROM THE CLOSING DATE   |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | BID PRICE IN RSA CURRENCY (ALL APPLICABLE TAXES INCLUDED) | | | | | | | | ITEM NO | QUANTITY (unit of measure) | DESCRIPTION OF SUPPLIES | | RATE/UNIT PRICE (per unit of measure) | | BID/QUOTE PRICE | | 1 |  |  | |  | |  | | 2 |  |  | |  | |  | | 3 |  |  | |  | |  | | 4 |  |  | |  | |  | | 5 |  |  | |  | |  | | TOTAL | | | | | |  | | B-BBEE STATUS OF CONTRIBUTION  (Per SBD 6.1 below | | | Level | | Preference Points Claimed | | |  | |  | |  |  |  |  |  |  | | --- | --- | --- | --- | --- | | Are detailed price schedules attached? | Yes |  | No |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | | Does the offer comply with the specification(s)? | Yes |  | No |  | | If the offer does not comply to specification, indicate deviation(s) in a separate attached schedule. | | | | |  1. **PREFERENCE POINTS CLAIM FORM (STANDARD BIDDING DOCUMENT 6.1)**    1. **POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTION**   In terms of Regulation 5 (2) and 6 (2) of the Preferential Procurement Regulations, preference points must be awarded to a Bidder for attaining the B-BBEE status level of contribution in accordance with the table below:   |  |  | | --- | --- | | B-BBEE Status Level of Contributor | Number of points (90/10 system) | | 1 | 10 | | 2 | 9 | | 3 | 8 | | 4 | 5 | | 5 | 4 | | 6 | 3 | | 7 | 2 | | 8 | 1 | | 0 | 0 |   B-BBEE STATUS LEVEL OF CONTRIBUTION CLAIMED IN TERMS OF THE ABOVE TABLE   |  |  |  |  |  | | --- | --- | --- | --- | --- | | B-BBEE Status Level of Contribution: |  | = |  | (maximum of 10 points) |   (Points claimed must be in accordance with the table reflected above and must be substantiated by means of a B-BBEE certificate issued by a Verification Agency accredited by SANAS or a Registered Auditor approved by IRBA or an Accounting Officer as contemplated in the CCA).   * 1. **SUB-CONTRACTING**  |  |  |  |  |  | | --- | --- | --- | --- | --- | | Will any portion of the contract be sub-contracted? | Yes |  | No |  | | If Yes, indicate:   |  |  | | --- | --- | | 1. What percentage of the contract will be subcontracted? |  | | 1. The name of the sub-contractor? |  | | 1. The B-BBEE status level of the sub-contractor? |  | | 1. Whether the sub-contractor is an EME? | Yes No | | | | | |   I/we, the undersigned, who is/are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBEE status level of contribution of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I/we acknowledge that:   1. The information furnished is true and correct; 2. The preference points claimed are in accordance with the General Conditions as indicated in Paragraph 1 of this form. 3. In the event of a contract being awarded as a result of points claimed as shown above, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct; 4. If the B-BBEE status level of contribution has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have – 5. Disqualify the Bidder from the bidding process; 6. Recover costs, losses or damages it has incurred or suffered as a result of that Bidder’s conduct; 7. Cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation; 8. Restrict the Bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, from obtaining business from any organ of state for a period not exceeding ten (10) years, after the audi alteram partem (hear the other side) rule has been applied; and forward the matter for criminal prosecution 9. A Bidder will not be awarded points for B-BBEE status level if it is indicated in the Bid documents that such a Bidder intends sub-contracting more than 25% of the value of the contract to any other enterprise that does not qualify for at least the points that such a Bidder qualifies for, unless the intended sub-contractor is an EME that has the capability and ability to execute the sub-contract. 10. A Bidder awarded a contract may not sub-contract more than 25% of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level than the Bidder concerned, unless the contract is sub-contracted to an EME that has the capability and ability to execute the sub-contract. 11. **The NRF’s Conditions of Contract**     1. **NATIONAL TREASURY GENERAL CONDITIONS OF CONTRACT**   General Conditions of Contract, as issued by National Treasury, are part of this contractual agreement and are made available on the NRF Website (www.nrf.ac.za. Click on “Bids” and select “Call for Bids”).  The Conditions of Contract stipulated in this Bid invitation form part of the Conditions of Contract applying to this document.   * 1. **BID RESPONSE PREPARATION COSTS**   The NRF is NOT liable for any costs incurred by a bidder in the process of responding to this Bid, including on-site presentations and the proposal a service provider may make and/or submit.   * 1. **CANCELLATION PRIOR TO AWARDING**   The NRF has the right to withdraw and cancel the Bid.   * 1. **LATE BIDS.**   Bids submitted after the stipulated closing date (and time) are not considered.   * 1. **COLLUSION, FRAUD AND CORRUPTION**   Any effort by Bidder/s to influence Bid evaluation, Bid comparisons or Bid award decisions in any manner may result in the rejection of the Bid concerned.   * 1. **CONFIDENTIALITY**   The successful Bidder agrees to sign a general confidentiality agreement with the NRF.   * 1. **VALIDITY PERIOD**   The Bid has a validity period of 150 days from date of closure of the Bid.   * 1. **VALIDATION OF SUBMITTED DOCUMENTATION**   The NRF has the right to have any documentation submitted by the Bidders inspected by another technical body or organisation.   * 1. **PRESENTATIONS AND PROOF OF CONCEPT**   The NRF has the right to call interviews/presentations/pitching sessions as well as proof of concept sessions with short-listed service providers before the final selection is done.   * 1. **INTELLECTUAL PROPERTY PROVIDED IN THE BID INVITATION**   All the information contained in this document is intended solely for the purposes of assisting Bidders to prepare their Bids. Any use of the information contained herein for other purpose than those stated in this document is prohibited.  The ownership and intellectual property rights of all designs, specifications, programming code and all other documentation provided by the NRF to the Bidder, both successful and unsuccessful, remain the property of the NRF   * 1. **INTELLECTUAL PROPERTY CONTAINED IN THE DELIVERABLES**   The ownership and intellectual property rights of all designs, specifications, programming code and all other documentation required as part of the delivery to the NRF reside with the NRF.   1. **DECLARATION OF INTEREST (STANDARD BIDDING DOCUMENT 4)**   Any legal person, including persons employed by the State¹, or persons having a kinship with persons employed by the State, including a blood relationship, may make an offer or offers in terms of this invitation to Bid (includes an advertised competitive Bid, a limited Bid, a proposal or written price quotation). In view of possible allegations of favouritism, should the resulting Bid, or part thereof, be awarded to persons employed by the State, or to persons connected with or related to them, it is required that the Bidder or his/her authorised representative, declare his/her position in relation to the evaluating/adjudicating authority where:   * 1. The Bidder is employed by the State; and/or   2. The legal person on whose behalf the Bidding Document is signed, has a relationship with persons/s person who is/are involved in the evaluation and or adjudication of the Bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and/or adjudication of the Bid.   In order to give effect to the above, the following questionnaire must be completed and submitted with this Bid.  Full Name of Bidder or his/her representative:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Identity Number:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Position occupied in the Company (director, trustee, shareholder², member):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Registration number of company, enterprise, close corporation, partnership agreement or trust:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Tax Reference Number:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  VAT Registration Number:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  The names of all directors/trustees/shareholders/members, their individual identity numbers, tax reference numbers and, if applicable, employee/PERSAL numbers must be indicated in a separate schedule including the following questions:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | |  | Schedule attached with the above details for all directors/members/shareholders | Yes |  | No |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | | Are you or any person connected with the Bidder presently employed by the state? If so, furnish the following particulars in an attached schedule: | Yes |  | No |  |   Name of person/ director/ trustee/ shareholder/member:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Name of state institution at which you or the person connected to the Bidder is employed:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Position occupied in the state institution:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Any other particulars:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   |  |  |  |  |  | | --- | --- | --- | --- | --- | | If you are presently employed by the State, did you obtain the appropriate authority to undertake remunerative work outside employment in the public sector? If Yes, did you attach proof of such authority to the Bid document? If No, furnish reasons for non-submission of such proof as an attached schedule | Yes |  | No |  | | (Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the Bid.) | | | | | | Did you or your spouse or any of the company’s directors/ trustees /shareholders /members or their spouses conduct business with the State in the previous twelve months? If so, furnish particulars as an attached schedule: | Yes |  | No |  | | Do you, or any person connected with the Bidder, have any relationship (family, friend, other) with a person employed by the State and who may be involved with the evaluation and or adjudication of this Bid? If so, furnish particulars as an attached schedule. | Yes |  | No |  | | Are you, or any person connected with the Bidder, aware of any relationship (family, friend, other) between any other Bidder and any person employed by the State who may be involved with the evaluation and or adjudication of this Bid? If so, furnish particulars as an attached schedule: | Yes |  | No |  | | Do you or any of the directors/ trustees/ shareholders/ members of the company have any interest in any other related companies whether or not they are bidding for this contract? If so, furnish particulars as an attached schedule: | Yes |  | No |  |  1. **CERTIFICATE OF INDEPENDENT BID DETERMINATION (STANDARD BIDDING DOCUMENT 9)**  |  | | --- | | I, the undersigned, in submitting this Bid in response to the invitation for the Bid made by the NATIONAL RESEARCH FOUNDATION, do hereby make the following statements that I certify to be true and complete in every respect: | | I have read and I understand the contents of this Certificate; | | I understand that the Bid will be disqualified if this Certificate is found not to be true and complete in every respect; | | I am authorised by the Bidder to sign this Certificate, and to submit the Bid, on behalf of the Bidder; | | Each person whose signature appears on the Bid has been authorised by the Bidder to determine the terms of, and to sign, the Bid on behalf of the Bidder; | | For the purposes of this Certificate and the accompanying Bid, I understand that the word “competitor” shall include any individual or organisation, other than the Bidder, whether or not affiliated with the Bidder, who: | | 1. Has been requested to submit a Bid in response to this Bid invitation; | | 1. Could potentially submit a Bid in response to this Bid invitation, based on their qualifications, abilities or experience; and | | 1. Provides the same goods and services as the Bidder and/or is in the same line of business as the Bidder | | The Bidder has arrived at the accompanying Bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However communication between partners in a joint venture or consortium³ will not be construed as collusive bidding. | | In particular, without limiting the generality of paragraphs above, there has been no consultation, communication, agreement or arrangement with any competitor regarding: | | 1. Prices; | | 1. Geographical area where product or service will be rendered (market allocation); | | 1. Methods, factors or formulas used to calculate prices; | | 1. The intention or decision to submit or not to submit, a Bid; | | 1. The submission of a Bid which does not meet the specifications and conditions of the Bid; or | | 1. Bidding with the intention not to win the Bid. | | In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this Bid invitation relates. | | The terms of this Bid have not been, and will not be, disclosed by the Bidder, directly or indirectly, to any competitor, prior to the date and time of the official Bid opening or of the awarding of the contract. | | I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to Bids and contracts, Bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of Section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation | | ³ Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract. |  1. **CONTRACT FORM - PURCHASE OF GOODS/WORKS/SERVICES (STANDARD BIDDING DOCUMENT 7)**   **PART 1 – WRITTEN OFFER (To Be Filled In By the Bidder)**  I hereby undertake to supply all or any of the goods and/or works described in the attached bidding documents to the NATIONAL RESEARCH FOUNDATION in accordance with the requirements and specifications stipulated in this Bid document at the price/s quoted. My offer/s remains binding upon me and open for acceptance by the purchaser during the validity period indicated and calculated from the closing time of Bid.  The following documents shall be deemed to form and be read and construed as part of this agreement even where integrated in this document:   |  |  | | --- | --- | | Invitation to Bid (SBD1) | Technical Specification(s); | | Bidder’s responses to technical specifications, capability requirements and capacity as attached to this document | | | Pricing Schedule(s) (SBD3); | Tax Clearance Certificate | | Preference claims for Broad Based Black Economic Empowerment Status Level of Contribution in terms of the Preferential Procurement Regulations 2011 (SBD6.1); | | | Declaration of Interest (SBD4); | Declaration of Bidder’s past SCM practices (SBD8); | | Certificate of Independent Bid Determination (SBD9) | General Conditions of Contract |   I confirm that I have satisfied myself as to the correctness and validity of my Bid; that the price(s) and rate(s) quoted cover all the goods and/or works specified in the bidding documents; that the price(s) and rate(s) cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.  I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this agreement as the principal liable for the due fulfilment of this contract.  I declare that I have had no participation in any collusive practices with any Bidder or any other person regarding this or any other Bid.  I certify that the information furnished in these declarations (SBD4, SBD6.1, SBD 6.2 where applicable, SBD8, SBD9) is correct and I accept that the state including the NRF may reject the Bid or act against me should these declarations prove to be false.  I confirm that I am duly authorised to sign this contract.   |  |  |  | | --- | --- | --- | | NAME (PRINT) |  | WITNESSES  1\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  2:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  DATE:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | CAPACITY |  | | SIGNTURE |  | | MANE OF FIRM |  | | DATE |  |   **PART 2 – ACCEPTANCE OF WRITTEN OFFER**  The National Research Foundation acceptance of this written offer is authorised by a duly delegated official of the NRF and is communicated through either a written Letter of Award or, dependent on the complexity, a written purchase order and such proof of authority is available upon request. |
| ANNEXURES |
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| --- | --- | --- | --- |
| SETS OF QUOTATION DOCUMENTS REQUIRED | | | |
| **Number of ORIGINAL bid documents for contract signing** | | | 2 |
| Bidders must submit the above number of original documents in hard copy format (paper document) to the NRF. These serve as the original sets for the legal bid document and, upon award and signature, the legal contract document between the bidder and the NRF. (Where only one set is requested, this remains with the NRF). The bidders attach the originals or certified copies of any certificates stipulated in this document to these original sets of bid documents.. | | | |
| *Number of EVALUATION copies* (1 x secured pdf for technical review and 1 x secured pdf for pricing review, if two-envelope system applies)**:** | | 1 evaluation copy (physical or electronic on a memory stick) | |
| Bidders mark documents as “**Copy for evaluation**” and number all pages sequentially. Bidders mark the secured pdfs on the electronic storage medium as “**Copy for evaluation**” | | | |
| RETURNABLE DOCUMENTS REQUIRED | | | |
| **The bidder is to complete this table and to supply the necessary page references to the supporting documentation. A bidder failing to adequately provide any of the mandatory documents is automatically disqualified.** | | | |
| **Legislative/Technical Documents** | Compliance | | |

| (M – Mandatory); (O – Optional) | Submitted | | Bid Section Reference | | Reference to Bidder’s document |
| --- | --- | --- | --- | --- | --- |
| **Bidder Eligibility** | | | | | |
| Procurement Invitation (SBD 1), signed and completed. | M | ❑ Yes  ❑ No | Page 7 | |  |
| Declaration of Interest with Government (SBD 4), signed and completed. | M | ❑ Yes  ❑ No | Pages 30 - 32 | |  |
| Preference Points Claimed (SBD 6.1), signed and completed. | M | ❑ Yes  ❑ No | Pages 32 – 36 | |  |
| Declaration of Past SCM Practices (SBD 8), signed and completed. | M | ❑ Yes  ❑ No | Page 39 | |  |
| Certificate of Independent Bid Determination (SBD 9), signed and completed. | M | ❑ Yes  ❑ No | Pages 39 – 40 | |  |
| Tax compliance status of foreign suppliers with tax obligations in South Africa. | **M** | ❑ Yes  ❑ No | Page 3 | |  |
| Where Sub contracting will be used SBD 6.1 has to be adhered to. | M | ❑ Yes  ❑ No | Page 17 | |  |
| **Specification Eligibility** | | | | | |
| Company Registration Documents | **M** | ❑ Yes  ❑ No | Attachment | |  |
| Business Profile | **M** | ❑ Yes  ❑ No | Attachment | |  |
| Central Supplier Database summary report | **M** | ❑ Yes  ❑ No | Attachment | |  |
| BBBEE Certificate | **M** | ❑ Yes  ❑ No | Attachment | |  |
| **Due diligence of Eligibility** | | | | | |
| Sound Industry track record and experience. | **M** | ❑ Yes  ❑ No | Attachment | |  |
| Proven capacity of human resources to deliver according to the scope of work | **M** | ❑ Yes  ❑ No | Attachment | |  |
| Three (3) written references with contact details | **M** | ❑ Yes  ❑ No | Attachment | |  |
| Curriculum Vitae of project team Leader | **M** | ❑ Yes  ❑ No | Attachment | |  |
| Price Offered Documents | Compliance | | | | |
| Pricing (SBD 3) in this document to be completed. | **M** | ❑ Yes  ❑ No |  |  | |
| Detailed pricing schedules and supporting documents | **O** | ❑ Yes  ❑ No | Attachment |  | |
| All prices should be inclusive of VAT and all other associated rates and taxes | **M** | ❑ Yes  ❑ No | Attachment |  | |

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| --- | --- | --- |
| PRE-QUALIFICATION ELIGIBILITY CRITERIA | | |
| **LOCAL CONTENT AS SPECIAL CONDITION OF CONTRACT** | | |
| Legislative local content | Not Applicable | |
| NRF specific local content | Not Applicable | |
| **ECONOMIC EMPOWERMENT AS SPECIAL CONDITION OF CONTRACT** | | |
| Pre-Qualifying Criteria | A minimum B-BBEE status level | Not Applicable |
| Pre-Qualifying Criteria | An exempted micro enterprise (EME) or qualifying small enterprise (QSE) | Not Applicable |
| Pre-Qualifying Criteria | At least 51% owned by black people | Not Applicable |
| Pre-Qualifying Criteria | At least 30% owned by black women | Not Applicable |
| **LOCAL EMPOWERMENT SUB-CONTRACTING AS A SPECIAL CONDITION OF CONTRACT** | | |
| Subcontracting to an EME or QSE which is at least 51% owned by black people | Not Applicable | |
| Subcontracting to an EME or QSE which is at least 51% owned by black youth | Not Applicable | |
| Subcontracting to an EME or QSE which is at least 51% owned by black women | Not Applicable | |
| Subcontracting to an EME or QSE which is at least 51% owned by black disabled people | Not Applicable | |
| Subcontracting to an EME or QSE living in rural or undeveloped areas or townships | Not Applicable | |
| Subcontracting to a cooperative which is at least 51% owned by black people | Not Applicable | |
| Subcontracting to an EME or QSE which is at least 51% owned by black military veterans | Not Applicable | |
| Subcontracting to an EME or QSE | Not Applicable | |
| **A bidder failing to meet any of the stipulated pre-qualifying criteria is automatically disqualified.** | | |

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| --- |
| **ELIGIBILITY CRITERIA (GO/NO-GO)** |

| **Selection Element** | | **Meet Specification Minimum** | **Bid Section Reference** | **Reference to Bidder’s document** |
| --- | --- | --- | --- | --- |
| 1 | Fully completed Procurement Invitation (SBD 1) including all documents in the Bidder Eligibility section, and signed Bid Submission Certificate form. | ❑ YES ❑ NO | Returnable Documents’ Bidder Eligibility section on page 23 |  |

| SBD 3.1: PRICING DETAIL | |
| --- | --- |
| **Pricing Special Conditions** | |
| 1 | **Pricing Schedule:** In terms of General Conditions of contract clause 17.1, the price schedule remains unchanged for the duration of the contract with the NRF accepting no changes, extensions, or additional ad hoc costs to the pricing conditions of the contract with the exception of any price adjustments authorised in the Special Conditions of Contract for pricing set out below: |
| **2** | **Firm Quantities over the Contract Period:** The NRF states what firm quantities are required during the current period. The NRF determines the time of delivery during the contract period. |
| **3** | **Estimated quantities over the Contract Period:** The NRF may require further quantities during the current contract period for the reason of future operational requirements where the quantities and timing are not yet known at the date of bid. |
| **4** | **Ceiling Price Calculation:** For bidding purposes and to establish the contract ceiling price, the NRF provides estimated quantities of what its requirements and estimated timing during the contract period for bidders to establish their pricing. |
| **5** | **Commitment to Contracted Service Provider:** The NRF does not provide guarantees or commitments that it will order this entire amount during the contract’s life. The NRF, through the signed contract, guarantees its procurement of the specified goods and/or services is from the contracted party only.  The NRF, when issuing the written purchase order, guarantees that the funding is available . and/or with the actual quantity and time of delivery being determined when such quantities are needed.. |
| **6** | **Commitment of funding to the Contract:** The NRF, when issuing the written purchase order under the contract , guarantees that the funding is available for that purchase order. |
| **7** | **Placement of written purchase orders for actual quantities ordered:** The NRF manages the execution of this contract through the issue of written purchase orders – stipulating quantity, description, delivery date, and the unit price as set out in this contract - for the contracted supplies. |
| 8 | **Price Adjustments:** In terms of General Conditions of Contract clause 17.1, the price adjustments with the rules for application are set out below as special conditions of Contract Clause 17.1.  **Price adjustments and their corresponding rules are for the management of price risks on the basis of the NRF and the contracted bidder sharing the risk equally.** |
| * *Insert appropriate text on price adjustments here if applicable, remove if not.* |
| 9 | Price quoted is South African Rands in terms of General Conditions of contract clause 16.4 |
| **10** | Price Basis Price quoted is fully inclusive of all costs including delivery to the specified NRF price delivery point and includes value- added tax, income tax, unemployment insurance fund contributions, and skills development levies in terms of General Conditions of contract clauses 12, 32.1, and 32.2. |
| **11** | Price Delivery Point: In cases where different delivery points influence the pricing, the bidder submits a separate pricing schedule for each delivery point. |
| Delivery points are:  ***Insert text*** |
| **12** | Detail Pricing Support: Detailed information e.g. costed bill of quantities is optional where not stated in the price schedule below and is provided as an annexure to the details included in this SBD 3 |
| **13** | Application of Preference Points: Pricing is subject to the addition of Preference Points as stipulated below - Standard Bidding Document 6.1 Preference claim form. |
| **PRICING SCHEDULE** | |

|  | QTY | DESCRIPTION/ (Reference to specific specification) | UNIT OF MEASURE | UNIT PRICE | | TOTAL PRICE |
| --- | --- | --- | --- | --- | --- | --- |
| Year 1 | | | | | |  |
| 1 |  |  |  |  | |  |
| Year 2 | | | | | |  |
| 2 |  |  |  |  | |  |
| Year 3 | | | | | |  |
| 3 |  |  |  |  | |  |
| Year 4 | | | | | |  |
| 4 |  |  |  |  | |  |
| Year 5 | | | | | |  |
| 5 |  |  |  |  | |  |
| Total Cost is determined by multiplying quantity by unit price for all line items | | | | | |  |
| TOTAL CONTRACT VALUE OF ABOVE (CEILING PRICE) | | | | | R | |

| GENERAL CONDITIONS OF CONTRACT | |
| --- | --- |
| **The National Research Foundation cannot amend the National Treasury’s General Conditions of Contract (GCC). The National Research Foundation therefore appends Special Conditions of Contract (SCC) providing specific information relevant to a GCC clause below the relevant GCC. The National Research Foundation has filed its General Conditions of Contract GCC) on its website (http://www.nrf.ac.za/procurement/General-Conditions-of-Contract). These form part of this document’s contract conditions. The NRF deems the bidder to have accessed and read the General Conditions of Contract. Whenever there is an unintended conflict, the provisions of the Special Conditions of Contract, listed below, shall prevail over the General Conditions of Contract.** | |
| SPECIAL CONDITIONS OF CONTRACT | | |
| 1 | **Implementation Planning and Project Management:** The contracted provider will arrange an initial meeting to determine delivery execution with the assigned NRF project team. Both parties will review the proposed project execution plan submitted with the bid and agree on the finalised timetable stating clearing commence date and completion date of each stage of the implementation. Special conditions pertaining to project management are listed below (if applicable). | |
|  | *Insert if applicable* | |
| 2 | **Performance verification:** In terms of GCC Clause 16 read with the SCC Clause 16.2A, the NRF appointed contract manager or agent verifies that the performance of this contract in terms of services, delivery service, goods, labour and any other element specified in this contract is at the contracted performance level and/or the goods meet the contracted specifications with the represented of the contracted provider. Both parties verify this through signing the verification documentation. Both parties, at this time, agree on quantity, unit cost and total value on the same signed document. | |
| 3 | **Software Maintenance Service:** The contracted provider, during any paid software maintenance service term, provides software maintenance service for the licensed program(s) which consist of delivering subsequent releases of the program, if any; exerting reasonable efforts to both (a) provide, within a reasonable time, workarounds for any material programming errors in the current release of the program that are directly attributable to the contract provider, and (b) correct such errors in the next available release, provided the NRF provides the contract provider with sufficient information to identify the errors. The NRF, during the same paid software maintenance service term, is entitled to receive technical support for the current release. Technical support means assistance by telephone, fax, electronic mail, and any digital communication methods with the installation and/or use of the then-current release of the licensed program, including all available bug fixes and patches, and their interaction with the supported hardware and operating systems (“Platforms”). | |
| 4 | **Contracted Party Due Diligence:** The NRF has the right to conduct supply chain due diligence including site visits and inspections at any time during the contract period. | |
| 5 | **Communication:** The contracted parties communicate in writing through mail, delivery, or email. The contracted party states the contract number and purchase order number, if the latter is applicable, on communication documentation. The contract party does not act upon any communication without the contract number or must verify such communication with the assigned NRF contract manager prior to acting upon it. | |
| 6 | **Occupational Health and Safety when working on NRF sites:** All personnel performing work on NRF site/s as part of this contract are responsible to obtain safety induction.  Over and above the obligations provided by the Occupational Health and Safety Act (OHS Act No 85 of 1993 and its Regulations, known as ‘the Act’), the contracted party meets with all relevant health and safety instructions as given to them by site safety personnel, where relevant. Personal protection equipment including closed safety shoes, hard hats, height safety equipment, and high visibility vests are worn at all times while on the work site. All personnel are to obey the relevant instructions, including signage, related to restricted access and speed limits on all sites.  The contracted party, once signing the contract (SBD 7), is responsible for itself, its employees, and those people affected by its operations in terms of the Act the regulations promulgated in terms thereof. The contracted party performs all work and uses equipment on site complying with the provisions of the Act.  To this end, the contracted party shall make available to the NRF on the valid Letter of Good Standing in terms of the COID Act and ensures its validity does not expire while executing this bid, where applicable. The contracted party furnishes its registration number with the office of the Compensation Commissioner. The contracted party enters into a Section 37.2 agreement in terms of Occupational Health and Safety Act (OHS Act No 85 of 1993 and its Regulations) that the NRF drafts.  The contracted party maintains a health and safety plan complying with the requirements of The Act at the work site during the period that contracted work takes place on the site.  The NRF manages the contracted party in his capacity for the execution of this contract to meet the provisions of the said Act and the regulations promulgated in terms thereof. The contracted party accepts liability for any contraventions to the Act. Each member of the contracted party’s team (including sub-contracted personnel), submit a signed indemnity form prior to entering the work site and kept in the contracted party’s health and safety file. | |
| MANAGEMENT OF PERFORMANCE LEVELS | | |
| 1. | The Performance Levels are in the table below. | |
| 2. | The NRF measures the contracted bidder’s performance against these in the execution of the contract. | |
| 3. | The contracted bidder recognises that its failure to meet the performance levels has material adverse impact on the operations of NRF and that the damage from the contracted bidder’s failure to meet any performance level is not susceptible to precise determination. | |
| 4. | The NRF excuses the contracted bidder from failing to comply with the performance levels to the extent that non-performance or delayed performance is solely and directly attributable to an act or omission of the NRF or its staff or circumstances of force majeure as referred to in this Agreement. | |
| 5. | If the contracted bidder fails to meet any performance level:   1. The contracted bidder shall investigate and report on the root causes of the performance level failure; 2. Promptly correct the failure and begin meeting the set performance levels; 3. Advise the NRF as and to the extent requested by the NRF of the status of remedial efforts being undertaken with respect to such performance level failure; and 4. Take preventive measures to prevent the recurrence of the performance level failure. | |
| 6. | Both parties are responsible for monitoring and measuring the performance of the contracted bidder against the performance levels set in this document. The NRF deems failure by the contracted bidder to measure performance with respect the contract specifications for any measurement period as a failure to meet the stipulated performance levels. | |
| **PERFORMANCE LEVELS STATEMENT** | | |

| Service/Goods being Measured | Measurement Methodology | **P**enalty/Bonus and level applicable from |
| --- | --- | --- |
| *e.g. Delivery of the specified goods and/or services* | *e.g. Both parties jointly check and confirm specifications are met* | *e.g. Penalty – replacement of failed parts and transport cost paid by contractor* |
| *e.g. Timeous delivery* | *e.g. Delivery delay exceeding 5 working days from the delivery date set in the placed purchase order* | *e.g. Penalty – 10% of invoice value and the penalties in GCC 22 in the general clause section* |
| *e.g. Software support response* | *e.g. Initial call response time – 24 hours; Resolved within 72 working hours* | *e.g. Where 72 hours exceeded, penalty is 5% of the original invoice value for each day of no response* |
| *e.g. Paid Software Upgrades* | *e.g. Within 2 weeks of receipt of upgrade notification* | *e.g. Where 2 weeks exceeded, penalty is 5% of the original invoice value for each day of no response* |
| *e.g. Spare parts service (taking into account the logistics route in the purchase order instruction)* | *e.g. Initial call response time – 24 hours; Delivery within 72 working hours of the agreed delivery date stated in the issued purchase order* | *e.g. Where 72 hours exceeded, the penalty is 5% of the original invoice value for each day late* |
| *e.g. Repairs service (taking into account the logistics route in the purchase order instruction)* | *e.g. Initial call response time – 24 hours; Delivery within 72 working hours of the agreed delivery date stated in the issued purchase order* | *e.g. Where 72 hours exceeded, the penalty is 5% of the original invoice value for each day late* |

| SBD 4 - DECLARATION OF INTEREST WITH GOVERNMENT | | | |
| --- | --- | --- | --- |
| Any legal person, including persons employed by the State (meaning any national or provincial department; national or provincial public entity; or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999); any municipality or municipal entity; provincial legislature; national Assembly or the national Council of provinces; or Parliament), or persons having a kinship with persons employed by the State, including a blood relationship, may make an offer or offers in terms of this invitation to Bid (includes an advertised competitive Bid, a limited Bid, a proposal or written price quotation). In view of possible allegations of favouritism, should the resulting Bid, or part thereof, be awarded to persons employed by the State , or to persons connected with or related to them, it is required that the Bidder or his/her authorised representative, declare his/her position in relation to the evaluating/adjudicating authority where:  The Bidder is employed by the State; and/or  The legal person on whose behalf the Bidding Document is signed, has a relationship with persons/s person who is/are involved in the evaluation and or adjudication of the Bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and/or adjudication of the Bid. | | | |
| In order to give effect to the above, the following questionnaire must be completed and submitted with this Bid: | | | |
| Full Name of Bidder or his/her representative: | |  | |
| Identity Number: | |  | |
| Position occupied in the Company (director, trustee, shareholder, member): | |  | |
| Registration number of company, enterprise, close corporation, partnership agreement: | |  | |
| Tax Reference Number: | |  | |
| VAT Registration Number: | |  | |
| The names of all directors/trustees/shareholders/members, their individual identity numbers, tax reference numbers and, if applicable, employee/PERSAL numbers must be indicated in a separate schedule including the following questions: | | | |
| Schedule attached with the above details for all directors/members/shareholders | | | |
| Are you or any person connected with the Bidder presently employed by the State? If so, furnish the following particulars in an attached schedule | | | ❑ Yes ❑ No |
|  | Name of person/ director/ trustee/ shareholder/member: | | |
| Name of State institution at which you or the person connected to the Bidder is employed | | |
| Position occupied in the State institution | | |
| Any other particulars: | | |
| If you are presently employed by the State, did you obtain the appropriate authority to undertake remunerative work outside employment in the public sector? | | | ❑ Yes ❑ No |
|  | If Yes, did you attach proof of such authority to the Bid document? | | |
| If No, furnish reasons for non-submission of such proof as an attached schedule | | |
| (Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the Bid.) | | |
| Did you or your spouse or any of the company’s directors/ trustees /shareholders /members or their spouses conduct business with the State including any business units of the National Research Foundation in the previous twelve months? | | | ❑ Yes ❑ No |
|  | If so, furnish particulars as an attached schedule | | |
| Do you, or any person connected with the Bidder, have any relationship (family, friend, other) with a person employed by the State and who may be involved with the evaluation and or adjudication of this Bid? | | | ❑ Yes ❑ No |
|  | If so, furnish particulars as an attached schedule. | | |
| Do you or any of the directors/ trustees/ shareholders/ members of the company have any interest in any other related companies whether or not they are bidding for this contract? | | | ❑ Yes ❑ No |
|  | If so, furnish particulars as an attached schedule: | | |

| PREFERENCE POINTS CLAIMED (SBD 6.1) | |
| --- | --- |
| **Preference points claim form for broad-based black economic empowerment (B-BBEE) status level of contribution in terms of the preferential procurement regulations 2017** | |
| NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS, AND DIRECTIVES APPLICABLE IN RESPECT OF B-BBEE, AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017. | |
| * GENERAL CONDITIONS   + The following preference point systems are applicable to all bids:     1. the 80/20 system for requirements with a Rand value of up to R 50 000 000 (all applicable taxes included); and     2. The 90/10 system for requirements with a Rand value above R 50 000 000 (all applicable taxes included)   + Points for this bid shall be awarded for:     - Price; and     - B-BBEE Status Level of Contributor | |
| The maximum points for this bid are allocated as follows: | POINTS |
| **PRICE** | 80 |
| **B-BBEE STATUS LEVEL OF CONTRIBUTION** | 20 |
| **Total points for Price and B-BBEE must not exceed** | 100 |
| * + Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor together with the bid will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.   + The purchaser reserves the right to require either of a bidder, before a bid is adjudicated or at any time subsequently, to substantiate any claim concerning preferences, in any manner required by the purchaser.  1. DEFINITIONS   “**B-BBEE**” means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;  “**B-BBEE status level of contributor**” means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;  “**bid**” means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of goods or services, through price quotations, advertised competitive bidding processes or proposals;  “**Broad-Based Black Economic Empowerment Act**” means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);  “**EME**” means an Exempted Micro Enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;  “**Functionality**” means the ability of a tenderer to provide goods or services in accordance with specifications as set out in the tender documents.  “**price**s” includes all applicable taxes less all unconditional discounts;  “**proof of B-BBEE status level of contributor**” means:  1. B-BBEE Status level certificate issued by an authorized body or person;  2. A sworn affidavit as prescribed by the B-BBEE Codes of Good Practice;  3. Any other requirement prescribed in terms of the B-BBEE Act;  **“QSE**” means a qualifying small business enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;  “**rand value**” means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;   1. POINTS AWARDED FOR PRICE   THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS  A maximum of 80 or 90 points is allocated for price on the following basis:  80/20 or 90/10  or  Where  Ps = Points scored for price of bid under consideration  Pt = Price of bid under consideration  Pmin = Price of lowest acceptable bid   1. **POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR**   In terms of Regulation 6 (2) and 7 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:   |  |  |  | | --- | --- | --- | | **B-BBEE Status Level of Contributor** | Number of points (90/10 system) | Number of points (80/20 system) | | 1 | 10 | 20 | | 2 | 9 | 18 | | 3 | 6 | 14 | | 4 | 5 | 12 | | 5 | 4 | 8 | | 6 | 3 | 6 | | 7 | 2 | 4 | | 8 | 1 | 2 | | Non-compliant contributor | 0 | 0 | | |
| 1. BID DECLARATION   Bidders who claim points in respect of B-BBEE Status Level of Contribution must complete the following:  B-BBEE STATUS LEVEL OF CONTRIBUTOR CLAIMED IN TERMS OF PARAGRAPHS 1.4 AND 4.1  B-BBEE Status Level of Contributor:= ………(maximum of 10 or 20 points)  (Points claimed in respect of paragraph 6.1 must be in accordance with the table reflected in paragraph 4.1 and must be substantiated by relevant proof of B-BBEE status level of contributor.  SUB-CONTRACTING  Will any portion of the contract be sub-contracted?  (Tick applicable box)   |  |  |  |  | | --- | --- | --- | --- | | YES |  | NO |  |   If yes, indicate:  1. What percentage of the contract will be subcontracted............…………….…………%  2. The name of the sub-contractor…………………………………………………………..  3. The B-BBEE status level of the sub-contractor......................................……………..  4. Whether the sub-contractor is an EME or QSE  (Tick applicable box)   |  |  |  |  | | --- | --- | --- | --- | | YES |  | NO |  |   Specify, by ticking the appropriate box, if subcontracting with an enterprise in terms of Preferential Procurement Regulations, 2017:   |  |  |  | | --- | --- | --- | | Designated Group: An EME or QSE which is at last 51% owned by: | **EME**  √ | QSE  √ | | Black people |  |  | | Black people who are youth |  |  | | Black people who are women |  |  | | Black people with disabilities |  |  | | Black people living in rural or underdeveloped areas or townships |  |  | | Cooperative owned by black people |  |  | | Black people who are military veterans |  |  | | OR | | | | Any EME |  |  | | Any QSE |  |  |   **DECLARATION WITH REGARD TO COMPANY/FIRM**  Name of company/firm: …………………………………………………………………………….  VAT registration number: ……………………………………….…………………………………  Company registration number:…………….……………………….…………………………….  TYPE OF COMPANY/ FIRM   Partnership/Joint Venture / Consortium   One person business/sole propriety   Close corporation   Company   (Pty) Limited  [TICK APPLICABLE BOX]  DESCRIBE PRINCIPAL BUSINESS ACTIVITIES  …………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………..  COMPANY CLASSIFICATION   Manufacturer   Supplier   Professional service provider   Other service providers, e.g. transporter, etc.  [TICK APPLICABLE BOX]  Total number of years the company/firm has been in business: ……………………………  I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBEE status level of contributor indicated in paragraphs 1.4 and 6.1 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I / we acknowledge that:  1. The information furnished is true and correct;  2. The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;  3. In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 6.1, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;  4. If the B-BBEE status level of contributor has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –  (a) disqualify the person from the bidding process;  (b) recover costs, losses or damages it has incurred or suffered as a result of that person’s conduct;  (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;  (d) recommend that the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury from obtaining business from any organ of state for a period not exceeding 10 years, after the Audi alteram partem (hear the other side) rule has been applied; and  (e) Forward the matter for criminal prosecution. | |

| SBD 6.2: DECLARATION CERTIFICATE FOR LOCAL PRODUCTION AND CONTENT FOR DESIGNATED SECTORS |
| --- |
| This Standard Bidding Document (SBD) must form part of all bids invited. It contains general information and serves as a declaration form for local content (local production and local content are used interchangeably).  Before completing this declaration, bidders must study the General Conditions, Definitions, Directives applicable in respect of Local Content as prescribed in the Preferential Procurement Regulations, 2017, the South African Bureau of Standards (SABS) approved technical specification number SATS 1286:2011 (Edition 1) and the Guidance on the Calculation of Local Content together with the Local Content Declaration Templates [Annex C (Local Content Declaration: Summary Schedule), D (Imported Content Declaration: Supporting Schedule to Annex C) and E (Local Content Declaration: Supporting Schedule to Annex C)].   1. **General Conditions**   Preferential Procurement Regulations, 2017 (Regulation 8) make provision for the promotion of local production and content.  Regulation 8.(2) prescribes that in the case of designated sectors, organs of state must advertise such tenders with the specific bidding condition that only locally produced or manufactured goods, with a stipulated minimum threshold for local production and content will be considered.  Where necessary, for tenders referred to in paragraph 1.2 above, a two stage bidding process may be followed, where the first stage involves a minimum threshold for local production and content and the second stage price and B-BBEE.  A person awarded a contract in relation to a designated sector, may not sub-contract in such a manner that the local production and content of the overall value of the contract is reduced to below the stipulated minimum threshold.  The local content (LC) expressed as a percentage of the bid price must be calculated in accordance with the SABS approved technical specification number SATS 1286: 2011 as follows:  LC = [1 - x / y] \* 100  Where  x is the imported content in Rand  y is the bid price in Rand excluding value added tax (VAT)  Prices referred to in the determination of x must be converted to Rand (ZAR) by using the exchange rate published by South African Reserve Bank (SARB) at 12:00 on the date of advertisement of the bid as indicated in paragraph 4.1 below.  **The SABS approved technical specification number SATS 1286:2011 is accessible on** [**http:/www.thedti.gov.za/industrial development/ip.jsp**](http://www.thedti.gov.za/industrial%20development/ip.jsp) **at no cost.**  A bid may be disqualified if this Declaration Certificate and the Annex C (Local Content Declaration: Summary Schedule) are not submitted as part of the bid documentation;   1. **The stipulated minimum threshold(s) for local production and content (refer to Annex A of SATS 1286:2011) for this bid is/are as follows:**   Description of services, works or goods Stipulated minimum threshold  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_%  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_%  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_%  **3**. Does any portion of the goods or services offered have any imported content?  (***Tick applicable box***)   |  |  |  |  | | --- | --- | --- | --- | | YES |  | NO |  |   3..1 If yes, the rate(s) of exchange to be used in this bid to calculate the local content as prescribed in paragraph 1.5 of the general conditions must be the rate(s) published by SARB for the specific currency at 12:00 on the date of advertisement of the bid.  The relevant rates of exchange information is accessible on www.reservebank.co.za  Indicate the rate(s) of exchange against the appropriate currency in the table below (refer to Annex A of SATS 1286:2011):   |  |  | | --- | --- | | **Currency** | **Rates of exchange** | | US Dollar |  | | Pound Sterling |  | | Euro |  | | Yen |  | | Other |  |   NB: Bidders must submit proof of the SARB rate (s) of exchange used.  **4.** Where, after the award of a bid, challenges are experienced in meeting the stipulated minimum threshold for local content the DTI must be informed accordingly in order for the DTI to verify and in consultation with the AO/AA provide directives in this regard.  **LOCAL CONTENT DECLARATION (REFER TO ANNEX B OF SATS 1286:2011)**   |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | | LOCAL CONTENT DECLARATION BY CHIEF FINANCIAL OFFICER OR OTHER LEGALLY RESPONSIBLE PERSON NOMINATED IN WRITING BY THE CHIEF EXECUTIVE OR SENIOR MEMBER/PERSON WITH MANAGEMENT RESPONSIBILITY (CLOSE CORPORATION, PARTNERSHIP OR INDIVIDUAL) IN RESPECT OF BID NO. .................................................................................  ISSUED BY: (Procurement Authority / Name of Institution): .........................................................................................................................  NB   1. The obligation to complete, duly sign, and submit this declaration cannot be transferred to an external authorized representative, auditor, or any other third party acting on behalf of the bidder. 2. Guidance on the Calculation of Local Content together with Local Content Declaration Templates (Annex C, D, and E) is accessible on http://www.thdti.gov.za/industrial development/ip.jsp. Bidders should first complete Declaration D. After completing Declaration D, bidders should complete Declaration E and then consolidate the information on Declaration C. **Declaration C should be submitted with the bid documentation at the closing date and time of the bid in order to substantiate the declaration made in paragraph (c) below**. Declarations D and E should be kept by the bidders for verification purposes for a period of at least 5 years. The successful bidder is required to update continuously Declarations C, D, and E with the actual values for the duration of the contract.   I, the undersigned, …………………………….................................................... (full names),  Do hereby declare, in my capacity as ……………………………………… ………..  of ...............................................................................................................(name of bidder entity), the following:   1. The facts contained herein are within my own personal knowledge. 2. I have satisfied myself that:    1. the goods/services/works to be delivered in terms of the above-specified bid comply with the minimum local content requirements as specified in the bid, and as measured in terms of SATS 1286:2011; and 3. The local content percentage (%) indicated below has been calculated using the formula given in clause 3 of SATS 1286:2011, the rates of exchange indicated in paragraph 4.1 above and the information contained in Declaration D and E which has been consolidated in Declaration C:  |  |  | | --- | --- | | Bid price, excluding VAT (y) | R | | Imported content (x), as calculated in terms of SATS 1286:2011 | R | | Stipulated minimum threshold for local content (paragraph 3 above) |  | | Local content %, as calculated in terms of SATS 1286:2011 |  |   **If the bid is for more than one product, the local content percentages for each product contained in Declaration C shall be used instead of the table above.**  **The local content percentages for each product has been calculated using the formula given in clause 3 of SATS 1286:2011, the rates of exchange indicated in paragraph 4.1 above and the information contained in Declaration C, D and E.**   1. I accept that the Procurement Authority / Institution have the right to request that the local content be verified in terms of the requirements of SATS 1286:2011. 2. I understand that the awarding of the bid is dependent on the accuracy of the information furnished in this application. I also understand that the submission of incorrect data, or data that are not verifiable as described in SATS 1286:2011, may result in the Procurement Authority / Institution imposing any or all of the remedies as provided for in Regulation 14 of the Preferential Procurement Regulations, 2017 promulgated under the Preferential Policy Framework Act (PPPFA), 2000 (Act No. 5 of 2000).   **SIGNATURE: DATE: \_\_\_\_\_\_\_\_\_\_\_**  **WITNESS No. 1 DATE: \_\_\_\_\_\_\_\_\_\_\_**  **WITNESS No. 2 DATE: \_\_\_\_\_\_\_\_\_\_\_** | |

| SBD 8 - DECLARATION OF BIDDER’S PAST SCM PRACTICES | |
| --- | --- |
| Is the Bidder or any of its directors listed on the National Treasury’s Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector? If Yes, furnish particulars as an attached schedule: | ❑ Yes  ❑ No |
| Is the Bidder or any of its directors listed on the Register for Tender Defaulters in terms of Section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)? If Yes, furnish particulars as an attached schedule: | ❑ Yes  ❑ No |
| Was the Bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five years? If Yes, furnish particulars as an attached schedule: | ❑ Yes  ❑ No |
| Was any contract between the Bidder and any NRF terminated during the past five years because of failure to perform on or comply with the contract? If Yes, furnish particulars as an attached schedule: | ❑ Yes  ❑ No |
| The Database of Restricted Suppliers and Register for Tender Defaulters resides on the National Treasury’s website (www.treasury.gov.za) and can be accessed by clicking on its link at the bottom of the home page. | |

| SBD 9: CERTIFICATE OF INDEPENDENT BID DETERMINATION |
| --- |
| I, the signatory to this document, in submitting this Bid in response to the invitation for the Bid made by the National Research Foundation, do hereby make the following statements that I certify to be true and complete in every respect: |
| I have read and I understand the contents of this Certificate; |
| I understand that the Bid will be disqualified if this Certificate is found not to be true and complete in every respect; |
| I am authorised by the Bidder to sign this Certificate, and to submit the Bid, on behalf of the Bidder; |
| Each person whose signature appears on the Bid has been authorised by the Bidder to determine the terms of, and to sign, the Bid on behalf of the Bidder; |
| For the purposes of this Certificate and the accompanying Bid, I understand that the word “competitor” shall include any individual or organisation, other than the Bidder, whether or not affiliated with the Bidder, who:   1. Has been requested to submit a Bid in response to this Bid invitation; 2. Could potentially submit a Bid in response to this Bid invitation, based on their qualifications, abilities or experience; and 3. Provides the same goods and services as the Bidder and/or is in the same line of business as the Bidder |
| The Bidder has arrived at the accompanying Bid independently from, and without consultation, communication, agreement, or arrangement with any competitor. However, communication between partners in a joint venture or consortium (meaning an association of persons for combining their expertise, property, capital, efforts, skill, and knowledge in an activity for the execution of the bid) will not be construed as collusive bidding. |
| In particular, without limiting the generality of paragraphs above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:   1. Prices; 2. Geographical area where product or service will be rendered (market allocation); 3. Methods, factors or formulas used to calculate prices; 4. The intention or decision to submit or not to submit, a Bid; 5. The submission of a Bid which does not meet the specifications and conditions of the Bid; or 6. Bidding with the intention not to win the Bid. |
| In addition, there have been no consultations, communications, agreements, or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this Bid invitation relates. |
| The terms of this Bid have not been, and will not be, disclosed by the Bidder, directly or indirectly, to any competitor, prior to the date and time of the official Bid opening or of the awarding the bid or to the signing of the contract. |
| I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to Bids and contracts, Bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of Section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation |

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| REFERENCE LETTER FORMAT |
| **Referee Letterhead**   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **Referee Legal Name:** | | | | | | | **REFERENCE ON COMPANY:** | | | | | | | Bid Number: | NRF/SAASTA/13/2018-2019 | | | | | | **Bid Description**  Appointment of a Service Provider to Conduct an Impact Study on the Science & Technology Youth Journalist Programme | | | | | | |  | | | | | | | Describe the service/work the above bidder provide to you below | | | | | | |  | | | | | | | **Criteria / risks** | | **Below requirements** | **Meets requirements** | **Exceeds requirements** | | |  | |  |  |  | | |  | |  |  |  | | |  | |  |  |  | | |  | |  |  |  | | |  | |  |  |  | | |  | |  |  |  | | |  | |  |  |  | | | Overall Impression | | Other comments | | | | | Approximate value of contract | |  | | | | | Would you use the provider again? | | | | | ❑ YES ❑ NO |  |  |  | | --- | --- | | Completed by: |  | | Signature: |  | | Company Name: |  | | Contact Telephone Number: |  | | Date: |  | |

| GENERAL CONDITIONS OF CONTRACT |
| --- |
| In this document words in the singular also mean in the plural and vice versa, words in the masculine mean in the feminine and neuter, words “department” means organs of state inclusive of public entities and vice versa, and the words “will/should” mean “must”.  **The National Research Foundation cannot amend the National Treasury’s General Conditions of Contract (GCC). The National Research Foundation therefore appends Special Conditions of Contract (SCC) providing specific information relevant to a GCC clause. Special Conditions specific to this bid contract are in this document.**  **The National Research Foundation has filed its General Conditions of Contract GCC) on its website (http://www.nrf.ac.za/procurement/General-Conditions-of-Contract). These form part of this document’s contract conditions. Bidders are deemed to have accessed and read the General Conditions of Contract. Whenever there is an unintended conflict, the provisions of the Special Conditions of Contract shall prevail over the General Conditions of Contract.** |

| BID SUBMISSION CERTIFICATE FORM - (SBD 1) | | | | |
| --- | --- | --- | --- | --- |
| I hereby undertake to supply all or any of the goods, works, and services described in this procurement invitation to the NRF in accordance with the requirements and specifications stipulated in this Bid Invitation document at the price/s quoted. | | | | |
| My offer remains binding upon me and open for acceptance by the NRF during the validity period indicated and calculated from the closing time of Bid Invitation. | | | | |
| The following documents are deemed to form and be read and construed as part of this offer / bid even where integrated in this document: | | | | |
|  | Invitation to Bid (SBD 1) | | | Specification(s) set out in this Quotation Invitation inclusive of any annexures thereto |
| Bidder’s responses to this invitation as attached to this document | | | Pricing Schedule(s) (SBD3) including detailed schedules attached |
| Local Content and Local Manufacturing Certification (SBD 6.2) in accordance with the SABS standard | | | |
| Declaration of Interest (SBD4) | | | Independent Price Determination (SBD 9) |
| Preference (SBD 6.1) claims for Broad Based Black Economic Empowerment Status Level of Contribution in terms of the Preferential Procurement Regulations 2017, supported by a valid certified BBBEE certificate. | | | |
| Declaration of Bidder’s past SCM practice (SBD 8) | | General Conditions of Contract and special/additional conditions of contract as set out in this document | |
| I confirm that I have satisfied myself as to the correctness and validity of my offer / bid in response to this Bid Invitation; that the price(s) and rate(s) quoted cover all the goods, works and services specified in the Bid Invitation and cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk. | | | | |
| I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me in terms of this Bid Invitation as the principal liable for the due fulfilment of the subsequent contract if awarded to me. | | | | |
| I declare that I have had no participation in any collusive practices with any Bidder or any other person regarding this or any other Bid. | | | | |
| I certify that the information furnished in these declarations (SBD 3, SBD 4, SBD 6.1, SBD 6.2 (if applicable), SBD 8, SBD 9) is correct and I accept that the NRF may reject the Bid or act against me should these declarations prove to be false. | | | | |
| I confirm that I am duly authorised to sign this offer/ bid response. | | | | |
| NAME (PRINT) | |  | | |
| CAPACITY | |  | | |
| SIGNATURE | |  | | |
| WITNESS 1 | |  | | |
| NAME | |  | | |
| SIGNATURE | |  | | |
| WITNESS **2** | |  | | |
| NAME | |  | | |
| SIGNATURE | |  | | |
| DATE | |  | | |

1. SAASTA : DST Science Engagement Strategy [↑](#footnote-ref-1)
2. National Research Foundation : National Research Foundation Strategy:2020 [↑](#footnote-ref-2)
3. National Research Foundation : National Research Foundation Strategy:2020 [↑](#footnote-ref-3)