

Invitation to Quote

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

Quote Number NRF/SAIAB 01-2024

SHORT DESCRIPTION OF REQUIREMENT

Appointment of a panel of service providers to produce NRF-SAIAB's marine reports, highlights publications and other research communications publications for a period of 5 years.

INVITATION TO QUOTE (SBD 1A)

Quote Number	NRF/SAIAB 01-2024
Closing Date and Time (as per NRF systems)	12 May 2023 at 11:00

HIGH LEVEL SUMMARY OF REQUIREMENTS

The South African Institute for Aquatic Biodiversity (NRF-SAIAB) is a National Facility of the National Research Foundation (NRF). NRF-SAIAB contributes to two National Operation Phakisa Labs through which South Africa has identified the potential to develop the Biodiversity Economy and the Blue Economy. With a significant amount of funding from the Department of Science and Innovation and the National Research Foundation, NRF-SAIAB has developed several high-level platforms capable of undertaking research, from marine offshore to various inland environments, which have positioned the Institute as an innovative leader in aquatic biodiversity research.

NRF-SAIAB seeks to appoint a panel of reputable and experienced service providers to produce SAIAB marine reports, highlights publications and other research communications materials mainly for NRF-SAIAB's African Coelacanth Ecosystem Programme (ACEP), the ACEP Phuhlisa Programme and SAIAB's Joint Marine Laboratories and other research projects on a needs basis. The service provider must have knowledge and an understanding of marine biodiversity and South Africa's coastal and marine ecosystems. The reports will be used to profile NRF-SAIAB's marine research highlights to different stakeholders such as funders, higher education institutions, research students, the general public, amongst many other stakeholders.

The services of successful bidders will be used ad-hoc on a rotational basis.

RESPONSE DOCUMENTS ARE DELIVERED TO:

EMAIL DELIVERY AS FOLLOWS:

Quotations can be delivered by email before the closing date and time to: bids@saiab.nrf.ac.za

ONLY PDF DOCUMENTS ARE ACCEPTABLE

Bidding procedure writing to:	e enquiries may be directed in	Technical information may be directed in writing to:			
Section	SCM	Section	Communications and Stakeholder Relations		
Contact person	Mr Nkosi Khuzwayo	Contact person	Mr Lucky Dlamini		
E-mail address	n.khuzwayo@saiab.nrf.ac.za	E-mail address	LB.Dlamini@saiab.nrf.ac.za		

SUPPLIER INFORMATION										
Name Of Bio	dder									
Postal Addr	ess									
Street Addre	ess									
Telenhone	lu waka w									
Telephone N Code	umper		Number							
Code Cell Phone N	lumbor	ľ	vumber							
Code	vuinder	N	Number							
Facsimile N	umber		NUTIDEI							
Code		N	Number							
E-Mail Addre	ess		Vulliber							
VAT Registr	ation Nu	mber								
Tax Complia Status	ance	Tax Com System F				OR	Central Supplier Database No.	MAA	A	
B-BBEE Stat	tus Leve	I	Tic	ck Applica	able Box.		B-BBEE Status Level	Tick Applicable Box.		ole Box.
Verification	Certifica	te		Yes [No		Sworn Affidavit		Yes 🖵	No
[A B-BBEE s				ertificate/	sworn aff	fidavit	(for EMEs & QSEs) must	be su	bmitted	in order to qualify
Are you the representati			for	T Ye	es 🗋 No		re you a foreign-based upplier for the			Yes 🗖 No
the goods /s				lf yes er	enclose proof		oods/services/ works		lf y	ves, answer the
							ffered?		que	stionnaire below
							G 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 er	Does the entity have a permanent establishment in the RSA?					□Yes □No				
Does the er	Does the entity have any source of income in the RSA?					□Yes □No				
Is the entity	liable in	the RSA fo	r any foi	rm of taxa	ation?					□Yes □No
If the answer the South Afr							t to register for a tax compl er 2.3 below.	iance s	status sy	vstem pin code from

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TERMS AND CONDITIONS FOR BIDDING (SBD 1B) **BID SUBMISSION:** 1. 1.1 Bids must be submitted by the stipulated time to the correct email address. Late bids will not be accepted for consideration. 1.2 All bids must be submitted on the official forms provided or in the manner prescribed in the bid document. 1.3 This bid is subject to the Preferential Procurement Policy Framework Act, 2000 and the Preferential Procurement Regulations, 2022, the General Conditions Of Contract (GCC) with its special conditions of contract, and, if applicable, any other legislative requirements. The successful bidder will be required to fill in and sign a written contract form (SBD7). 1.4 2. 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. Application for tax compliance status (TCS) pin may be made via e-Filing through the SARS website 2.3 www.sars.gov.za. Bidders may also submit a printed TCS certificate together with the bid. 2.4 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. No bids will be considered from persons in the service of the state, companies with directors who are persons in the 2.7 service of the state, or close corporations with members persons in the service of the state. 3. VALIDITY PERIOD FROM DATE OF CLOSURE 60 days 4. **BRIEFING SESSION OR SITE VISIT DETAILS** Attendance: Not applicable Date and Time: Not applicable Venue: Not applicable Address: Not applicable **Contact Person:** Not applicable 5. 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

TERMS AND CONDITIONS FOR BIDDING (SBD 1B)
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) 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.
6. ACKNOWLEDGEMENT OF READING EACH PAGE
The bidder warrants by signature in this document that the bidder has read and accepts each page.
7. 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.
8. CLARIFICATION
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.
9. RESPONSE PREPARATION COSTS
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.
10. COLLUSION, FRAUD AND CORRUPTION

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.

11. FRONTING

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.

12. DISCLAIMERS

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.

13. CANCELLATION OF THE QUOTATION PRIOR TO AWARD

<u>Procurement not required:</u> 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.

<u>No Acceptable Quotations</u>: 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.

<u>Insufficiency of Funds at date of Award</u>: 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.

<u>Quoted Prices are within a fair price range</u>: 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:

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.

The NRF is the government's national agency responsible for promoting and supporting research and human capital development through funding, the provision of National Research Facilities and science outreach platforms and programs to the broader community in all fields of science and technology, including natural science, engineering, social science and humanities.

The **South African Institute for Aquatic Biodiversity (SAIAB)**, based in Makhanda formerly known as Grahamstown, Eastern Cape, is a **National Research Facility of the National Research Foundation**, a public entity, established in terms of the National Research Foundation Act No. 23 of 1998. SAIAB is an internationally recognised centre for the study of aquatic biodiversity.

CONTEXT OF THIS PROCUREMENT

The South African Institute for Aquatic Biodiversity is a biological sciences research Institute specialising in aquatic biodiversity, with a specific academic focus on fish (Ichthyology). NRF-SAIAB's research focuses on the full spectrum of aquatic environments, from marine offshore to continental freshwater catchments. Research covers ecology and conservation biology that links biodiversity at molecular and organism levels with the environment, genetic and species diversity. The Institute specialises in providing cutting-edge research infrastructure platforms for research in these various environments, and particularly in the marine field to develop the Biodiversity Economy and the Blue Economy, including the supervision of postgraduate students towards MSc and PhD qualifications.

As an innovative leader in aquatic biodiversity research, at the NRF-SAIAB, knowledge is our gold; it is the precious commodity that we mine and refine, through our support and advancement of scientific enquiry. Entrusted and empowered to transform knowledge into the working capital of a better society, we seek to become an even more transformed and agile organisation in the decade ahead. With this, NRF-SAIAB's Mission 2030 is:

To improve the quality of life of all South Africans through advancing aquatic research, science, technology and innovation.

SAIAB's mandate for the next decade is to provide a transformed national institutional platform to develop human skills and capacity to conduct and promote world-class research on the biodiversity of South African aquatic ecosystems.

Therefore, NRF-SAIAB intends to communicate it's work to the public, funders, policy makers and many other stakeholders through various communications such as research reports, highlights publications and other communications publications such as flyers, newsletters, brochures, posters, infographics, etc.

Through these communications publications, NRF-SAIAB aims to showcase that its research is in line with the NRF Vision 2030 'Research for a better society', that is 'Advancing knowledge; Transforming lives; and Inspiring a nation'.

Our pathway to Vision 2030 is grounded by four inseparable and inter-dependent guiding frameworks, and to which our research communications productions need to reflect:

- Transformation
- Excellence
- Impact
- Sustainability

In the production and compilation of NRF-SAIAB's marine reports and other communications materials/publications, the service provider will need to align NRF-SAIAB's content to reflect our pathway to <u>Vision and Mission 2030</u> and our four inseparable and inter-dependent guiding frameworks.

CONTRACT PERIOD

The contract period for this contract is five (5) years.

INTERDEPENDENCIES TO OTHER PROCESSES IMPACTING THIS SPECIFICATION

Related services that will be required from time to time

- Manuscript compilation, layout and production management (e.g. Annual Marine Reports of up to 100+ pages).
- Highlights publications profiling NRF-SAIAB's achievements or milestones over a period of time.
- NRF-SAIAB newsletter highlighting research work.

DETAILED SPECIFICATION

NRF-SAIAB seeks to appoint a panel of reputable and experienced service providers to produce NRF-SAIAB marine reports, highlights publications and other communications publications/materials for a period of 5 years. These productions will be mainly for NRF-SAIAB's African Coelacanth Ecosystem Programme (ACEP), the ACEP Phuhlisa Programme and Joint Marine Laboratories managed by NRF-SAIAB at the four historically disadvantaged institutions (UNIZULU, WSU, UFH and UWC), including other research projects on a needs basis.

The individual/company will need to have a thorough understanding of the aquatic biodiversity spectrum, and particularly marine research and the research environment, as they will be required to conceptualise, source, compile, synthesise and edit marine scientific information from multiple stakeholders (such as NRF-SAIAB's marine platform managers, research students, supervisors, collaborating universities and other stakeholders, etc.). As such, the appointed service provider needs to have a background in science writing and marine report production, including but not limited to the following productions:

- Standalone marine reports (100+ pages)
- Synthesis reports
- Various communications materials/productions as requested by NRF-SAIAB, such as (brochures, flyers, newsletters, posters, infographics, highlights publications etc.)

The appointed service provider will be expected to provide or manage (but not limited to) the following services:

- Conceptualisation
- Collation
- Stakeholder management
- Synthesis
- Layout
- Editing
- Proofing
- Printing

Scope of work

The scope requires that material is collected from multiple stakeholders, collated and condensed.

The service provider will be responsible for the following deliverables:

- Design and layout of a report including cover page, table of contents, executive summary, and all other necessary sections.
- Content Development: Development of written content, including descriptive text, data analysis, charts, graphs, and other visual
 aids to effectively communicate key findings or highlights.
- Editing and Proofreading: Thorough editing and proofreading of all content for accuracy, grammar, spelling, and consistency.
- The report should be written in clear, concise language, with appropriate figures, tables and other visuals to support the analysis.
- As such, the task is not simply collation and layout but requires an understanding of aquatic biodiversity, and particularly marine research techniques and concepts.

Deliverables:

The service provider will be required to deliver the following:

Draft reports (100+ pages), highlights publications or communications materials for review by NRF-SAIAB.

- A final report, including all revisions and edits as requested by NRF-SAIAB.
- Electronic copies of the report in PDF and Word formats.
- A summary of the report suitable for dissemination to the wider public.

Timeline:

The service provider should provide a detailed timeline for the completion of the project. The timeline should include the following milestones:

- Completion of the first draft of the report.
- Review and feedback from NRF-SAIAB.
- Finalisation of the report, including revisions and edits.
- Delivery of the final report and summary.

Expectations and Budget:

- The service provider will be paid an hourly rate.
- The supplier must be able to adhere to NRF-SAIAB's branding and style guidelines.
- Appointees must be willing to meet at NRF-SAIAB, in Makhanda when requested. Travel costs will NOT be covered by NRF-SAIAB.
- The panel will consist of a maximum of three (3) and a minimum of two (2) service providers.

Requirements:

The service provider must have the following qualifications and experience:

- Demonstrated experience in producing high-quality reports, publications, research communications promotional materials etc. preferably in the field of marine science, aquatic biodiversity or environmental topics.
- Proficiency in design software such as Adobe InDesign, Adobe Illustrator, or similar tools.
- Strong writing, editing, and proofreading skills.
- Experience working with scientific data and presenting it in an accessible format.
- Proven track-record of delivering projects on time and within budget.

Minimum requirements:

The service provider will be selected based on the following criteria:

- Relevant experience producing similar reports.
- Demonstrated understanding of the issues related to the full spectrum of aquatic environments and particularly marine biodiversity, i.e. South Africa's coastal and marine ecosystems.
- Demonstrated ability to communicate scientific findings to a wider audience.
- Marine science degree OR a journalism, science communication degree/qualification or similar will be considered, providing the individual is able to demonstrate a clear understanding of aquatic biodiversity, and particularly marine research and associated techniques and concepts.
- Portfolio of marine programme reports: Minimum experience of having produced three large South African marine reports of 50+Pages long in a professional layout package.
- A clear understanding of the South African marine research landscape (universities, researchers, programmes).
- Experience with and understanding of the marine programmes and researchers at Historically Disadvantages Institutions is highly desirable.
- Experience using publishing software (portfolio of products)
- Artistic layout capability Portfolio
- Clear demonstration of conceptualising and managing entire production process to a final print and digital version.
- Experience in managing multiple stakeholders from various universities to ensure that they produce the required input on time and in the right format.
- Experience in procurement and management of printing companies.

Very importantly, in the conceptualisation, production and compilation of NRF-SAIAB's marine reports and other communications materials/publications, the service provider must align or represent NRF-SAIAB's content/information to reflect our pathway themes to <u>Vision</u> and <u>Mission 2030</u> and our four inseparable and inter-dependent guiding frameworks:

- Transformation
- Excellence
- Impact

Sustainability

Please see our NRF Vision 2030 document for further details: https://www.nrf.ac.za/wp-content/uploads/2021/03/NRF-Vision-2030_0.pdf

Award of contract:

The NRF-SAIAB will award the contract to the service provider whose submission best meets the requirements and evaluation criteria outlined in this RFQ. The NRF-SAIAB reserves the right to reject any or all submissions.

Selection Criteria:

Report compilation, layout and production management (e.g. Marine Reports up to 100+ pages).

In order for SAIAB to evaluate whether the bidder(s) meet(s) the technical evaluation, the following is required:

- 1. Marine science degree OR a journalism, science communication degree/qualification or similar.
- 2. The bidder must have had a minimum five (5) years proven experience in the compilation of high level aquatic biodiversity or marine reports and related communications publications for scientific institutions. This will include compilation, layout and full production management of such publications. This will be measured by the bidder providing a CV and cover letter which directly indicates five (5) years scientific/marine/aquatic biodiversity publication and report production experience.
- 3. The bidder is required to provide a list of three (3) reference letters from previous clients with similar projects.
- 4. The bidder is required to provide a portfolio of evidence or samples of previous work in a similar scope of work.

Three (3) highest scoring bidders in terms of price and preference (specific goals) will be appointed to the panel

This bid is subject to price negotiations.

Number of ORIGINAL bid documents for contract signing		1				
Bidders must submit the above number of documents to SAIAB by email in PDF format. 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						
RETURNABLE DOCU	MENTS	REQUIRED				
The bidder is to complete this table and to supply the necessary page references to the supporting documentation. A bidder failing to adequately meet the below requirements may be disqualified.						
Legislative/Technical Documents		Complianc	e			
(M – Mandatory); (O – Optional)	\$	Submitted	Bid Section Reference	Reference to Bidder's document		
Bidder Eligibility		[
Procurement Invitation (SBD 1), signed and completed.	М	🗅 Yes 🗅 No	Page 6			
Bidder Disclosure (SBD 4), signed and completed.	М	🗅 Yes 🗅 No	Page 19			
Preference Points Claimed (SBD 6.1), signed and completed.	М	🗅 Yes 🗅 No	Page 22			
Tax compliance status of foreign suppliers with tax obligations in South Africa.	Μ	🗅 Yes 🗅 No	Page 3			
Selection Criteria						
Marine science degree OR a journalism, science communication degree/qualification or similar.	Μ	🗆 Yes 🗅 No				
The bidder must have a minimum of four (4) years' experience in the industry as supported by the submitted CV and Cover Letter. The service provider must have knowledge and an understanding of marine biodiversity and South Africa's coastal and marine ecosystems.		🗅 Yes 🗅 No				
The bidder must provide a minimum of three (3) reference letters from previous clients with similar projects.		🗅 Yes 🗅 No				
Point Scoring for the portfolio of evidence	points ou	ut of the maximu	um of 100	e minimum of 80 points to be eligible e of the evaluation.		
 The bidder must provide a portfolio of evidence or samples of previous work in a similar scope of work. The scoring for the evaluation will be as follows: Demonstrated understanding of the issues related to the full spectrum of aquatic environments and particularly marine biodiversity, i.e. South Africa's coastal and marine ecosystems, and of the South African marine research landscape universities, researchers, and programmes. Demonstrated ability to communicate scientific findings to a wider audience. Marine science degree OR a journalism, science communication degree/qualification or similar will be considered, providing the individual is able to demonstrate a clear understanding of aquatic 		 1. □10 points 2. □10 points 3. □15 points 4. □15 points 5. □5 points 6. □15 points 				

SETS OF QUOTATION DOCUMENTS REQUIRED

(M – Mandatory); (O – Optional)	5	Submitted	Bid Section Reference	Reference to Bidder's document
 biodiversity, and particularly marine research and associated techniques and concepts. 4. Portfolio of marine programme reports: Minimum experience of having produced three large South African marine reports of 50+Pages long in a professional layout package. 5. Experience with and understanding of the marine programmes and researchers at Historically Disadvantages Institutions is highly desirable. 6. Experience using publishing software (portfolio of products) 7. Artistic layout capability – Portfolio 8. Clear demonstration of conceptualising and managing entire production process to a final print and digital version. 9. Experience in managing multiple stakeholders from various universities to ensure that they produce the required input on time and in the right format. 10. Experience in procurement and management of printing companies. 		 7. □10 points 8. □10 points 9. □5 points 10. □5 points Total = 100 points 		
Price Offered Documents	Complian	ce		
Pricing (SBD 3) in this document to be completed.		🗅 Yes 🗅 No	Page 14	
Detailed pricing schedules and supporting documents	0	🗅 Yes 🗅 No		

ELIGIBILITY CRITERIA (GO/NO-GO) AND FUNCTIONALITY

	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 11	
2	Marine science degree OR a journalism, science communication degree/qualification or similar.	🗆 YES 🗆 NO		
3	The bidder must have a minimum of four (4) years' experience in the industry as supported by the submitted CV and Cover Letter. The service provider must have knowledge and an understanding of marine biodiversity and South Africa's coastal and marine ecosystems.	□ YES □ NO		
4	The bidder must provide a minimum of three (3) reference letters from previous clients with similar projects.	🗆 YES 🗆 NO		
5	The bidder must provide a portfolio of evidence or samples of previous work in a similar scope of work	■80 points or more ■Less than 80 points		

	SBD 3.1: PRICING DETAIL
Pricir	ng Special Conditions
1	Pricing Schedule: In terms of <u>General Conditions of contract clause 17.1</u> , 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	<u>Commitment of funding to the Contract</u> : 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	<u>Price Adjustments:</u> In terms of <u>General Conditions of Contract clause 17.1</u> , the price adjustments with the rules for application are set out below as special conditions of <u>Contract Clause 17.1</u> . <u>Price adjustments and their corresponding rules are for the management of price risks on the basis of the NRF and</u>
9	<u>the contracted bidder sharing the risk equally.</u> <u>Price quoted</u> 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	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
12	<u>Application of Preference Points</u> : Pricing is subject to the addition of Preference Points as stipulated below - Standard Bidding Document 6.1 Preference claim form.

SBD 3.1: PRICING DETAIL

PRICING SCHEDULE

No amount of sales is guaranteed, items listed below are for use in pricing comparison. Products/services which will be required over the duration of the contract are dependent on circumstances which cannot be determined in advance and are not restricted to the items and quantities included in the initial purchase. The total value of the contract is limited to R500 000 over the contract period.

	QTY	DESCRIPTION/ (Reference to specific specification)	UNIT OF MEASURE	UNI	F PRICE	TOTAL PRICE
1	1	Production of NRF-SAIAB marine reports, highlights publications and other communications publications/materials	Hour			
The total is determined by multiplying quantity by unit price for all line items (Costs must all be VAT inclusive at all times.)						
TOTA	TOTAL VALUE OF ABOVE 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 <u>Implementation Planning and Project Management:</u> 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.
- 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 <u>Contracted Party Due Diligence</u>: The NRF has the right to conduct supply chain due diligence including site visits and inspections at any time during the contract period.

5 <u>**Communication:**</u> 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 <u>Occupational Health and Safety when working on NRF sites:</u> 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

GENERAL CONDITIONS OF CONTRACT

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.

7 The contract price is subject to contract price adjustment in accordance with the actual increase or decrease resulting from the change, imposition, or abolition of customs or excise duty and any other duty, levy, or tax, which, in terms of the law or regulation, is binding on the service provider and demonstrably has an influence on the price of any supplies, or the rendering costs of any service, for the execution of the contract.

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 nonperformance 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.

MANAGEMENT OF PERFORMANCE LEVELS

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	Penalty/Bonus and level applicable from
Professionalism	Deadlines are met on time	Recorded against performance
Documentation	All documentation is submitted to the institute	Recorded against performance
Accuracy and completeness of information	The content should be presented in a clear and organized manner, with a logical flow of ideas and coherent transitions between sections. The language used should be appropriate for the intended audience and free from grammatical errors. The information presented should be supported by relevant references and citations, where necessary.	Penalty – The report will be evaluated by the client and/or experts in the field. If the report is of a satisfactory quality, the contractor will receive the full payment. If the report fails to meet the quality standards, the contractor will be required to revise the report at no additional cost or receive a penalty.
Adherence to budget	The contractor must produce the report within the specified budget. Any additional expenses must be pre-approved by the client.	If the contractor exceeds the agreed-upon budget, the additional expenses will be the responsibility of the contractor unless pre- approved by the client.

SBD 4 - BIDDER DISCLOSURE

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

1. BIDDER'S DECLARATION

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise,

employed by the state?

YES/NO

2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of State institution

¹ the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

SBD 4 - BIDDER DISCLOSURE

- 2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**
- 2.2.1 If so, furnish particulars:

.....

- 2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**
 - 1. If so, furnish particulars:

.....

2. DECLARATION

I, the undersigned, (name)..... in submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 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 consortium² will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying 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.
- 3.5 There have been no consultations, communications, agreements or arrangements made by

² 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.

SBD 4 - BIDDER DISCLOSURE		
	prior to and during the bidding	he procuring institution in relation to this procurement process process except to provide clarification on the bid submitted tution; and the bidder was not involved in the drafting of the ence for this bid.
1.	1. I am aware that, in addition and without prejudice to any other remedy provided to co any restrictive practices related to bids and contracts, bids that are suspicious will be rep to the Competition Commission for investigation and possible imposition of administ penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be rep to the National Prosecuting Authority (NPA) for criminal investigation and or may be rest from conducting business with the public sector for a period not exceeding ten (10) ye terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any applicable legislation.	
	I CERTIFY THAT THE INFORI	MATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE
	I ACCEPT THAT THE STATE	MAY REJECT THE BID OR ACT AGAINST ME IN TERMS
	OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND	
	COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS	
	DECLARATION PROVE TO BE FALSE.	
	Signature	Date
	Position	Name of bidder

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022

1. GENERAL CONDITIONS

- 1.1 The following preference point systems are applicable to invitations to tender:
 - the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
 - the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).
- 1.2 The applicable preference point system for this tender is the 80/20 preference point system.
- 1.

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price; and
- (b) Specific Goals.
- 1.4 The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	100

- 1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.
- 1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

- (a) "tender" means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) "price" means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **"rand value"** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) "tender for income-generating contracts" means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) "the Act" means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

2.

3.1.1 THE 80/20 PREFERENCE POINT SYSTEMS

A maximum of 80 points is allocated for price on the following basis:

$$Ps = 80\left(1 - \frac{Pt - P\min}{P\min}\right)$$

Where

- Ps = Points scored for price of tender under consideration
- Pt = Price of tender under consideration
- Pmin = Price of lowest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

Table 1: Specific goals for the tender and points claimed are indicated per the table below.

Notes to tenderers: The tenderer must indicate how they claim points for each preference point system. The tenderer must submit Proof of B-BBEE status level of contributor.

B-BBEE Status Level of Contribution	Number of points allocated (80/20 system) (between R2 000 and R50 000 000)	Number of points claimed (80/20 system) (To be completed by the tenderer)
1	20	
2	18	
3	14	
4	12	
5	8	
6	6	
7	4	
8	2	
Non-compliant contributor	0	

DECLARATION WITH REGARD TO COMPANY/FIRM

- 4.1. Name of company/firm.....
- 4.2. Company registration number:
- 4.3. TYPE OF COMPANY/ FIRM
 - Dertnership/Joint Venture / Consortium
 - □ One-person business/sole propriety
 - Close corporation
 - Public Company
 - Personal Liability Company
 - □ (Pty) Limited
 - □ Non-Profit Company
 - □ State Owned Company

[TICK APPLICABLE BOX]

- 4.4. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:
 - i) The information furnished is true and correct;

- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have
 - (a) disqualify the person from the tendering 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 tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted 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, if deemed necessary.

	SIGNATURE(S) OF TENDERER(S)
SURNAME AND NAME:	
DATE:	
ADDRESS:	

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	Pricing Schedule(s) (SBD3) including detailed schedules			
this document		attached			

Local Content and Local Manufacturing Certification (SBD 6.2) in accordance with the SABS standard

Bidder Disclosure (SBD 4)

Preference (SBD 6.1) claims for Broad Based Black Economic Empowerment Status Level of Contribution in terms of the Preferential Procurement Regulations 2022, supported by a valid certified BBBEE certificate.

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.

BID SUBMISSION CERTIFICATE FORM - (SBD 1)

I certify that the information furnished in these declarations (SBD 3, SBD 4, SBD 6.1) 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	