



TOURISM KWAZULU-NATAL INVITES ELIGIBLE SERVICE PROVIDERS TO SUBMIT A WRITTEN QUOTATION FOR THE GOODS/SERVICES REQUIRED AS STIPULATED IN THIS REQUEST FOR QUOTATION

REQUEST FOR QUOTATION

REQUISITION NUMBER	10649
DESCRIPTION	BUSINESS EVENTS – NOT JUST THE ECONOMICS APPOINTMENT OF A SERVICE PROVIDER TO MEASURE THE SOCIAL IMPACT OF BUSINESS TOURISM FOR THE PROVINCE OF KWAZULU-NATAL
CLOSING DATE AND TIME	14 FEBRUARY 2024 @ 16H00
CSD No.	
SUBMISSION DETAILS	Email Submission: quotes@zulu.org.za OR Hand Delivery: Tourism KwaZulu-Natal 2nd floor, Ithala Trade Centre Building, 29 CanalQuay, Point, Durban (Document must be inserted into the Bid Box) <i>Late submissions will not be accepted</i>
SCM ENQUIRIES	Contact: Philile Radebe Tel / Email: 031 366 7594 Phililer@zulu.org.za
TECHNICAL ENQUIRIES	Contact: Wayne Tifflin Tel / Email: 031 366 7548 Wayne@zulu.org.za

NAME OF BIDDER.....

PART A
INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF TOURISM KWAZULU-NATAL (TKZN)				
BID NUMBER:	CLOSING DATE: 14 February 2024		CLOSING TIME: 16h00	
DESCRIPTION				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)				
2 nd Floor, Ithala Trade Centre Building				
29 Canal Quay Road				
Point Waterfront				
Durban				
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:	
CONTACT PERSON			CONTACT PERSON	
TELEPHONE NUMBER			TELEPHONE NUMBER	
FACSIMILE NUMBER			FACSIMILE NUMBER	
E-MAIL ADDRESS			E-MAIL ADDRESS	
SUPPLIER INFORMATION				
NAME OF BIDDER				
POSTAL ADDRESS				
STREET ADDRESS				
TELEPHONE NUMBER	CODE		NUMBER	
CELLPHONE NUMBER				
FACSIMILE NUMBER	CODE		NUMBER	
E-MAIL ADDRESS				
VAT REGISTRATION NUMBER				
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No: MAAA
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED? <input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]	
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS				
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? <input type="checkbox"/> YES <input type="checkbox"/> NO				
DOES THE ENTITY HAVE A BRANCH IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO				
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO				
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO				
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? <input type="checkbox"/> YES <input type="checkbox"/> 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.				

PART B TERMS AND CONDITIONS FOR BIDDING

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.**
- 1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
- 1.4. **THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).**

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.
- 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 PIN 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."

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:

TERMS AND CONDITIONS

1.DESCRIPTION	Yes	No	Noted	If no, indicate deviation
1.1 Quotations must be delivered by the stipulated time to the correct address. Late quotations will not be accepted for consideration				
1.2 All quotations must be submitted on the official forms provided– (not to be re-typed) or online				
1.3 Quotations above R2000 will be evaluated based on functionality (where applicable)				
1.4 This quotation is subject to the Preferential Procurement Policy Framework Act 2000 and, the General Conditions of Contract (GCC) and, if applicable, any other legislation or special conditions of contract				
1.5 TKZN reserves the right to enter negotiations with a prospective contractor regarding any terms and conditions, including price(s), of a proposed contract.				
1.6 TKZN shall not be obliged to accept the lowest or any financial offer or proposal.				
1.7 TKZN will disregard the bid of any bidder if that bidder or any of its directors have abused the institutions supply chain management system and or committed fraud or any other improper conduct in relation to such system.				
1.8 TKZN will list bidders / directors in the list of restricted suppliers and they will not conduct any business with an organ of state				
1.9 Tax Compliance Requirements: 1.9.1 Bidders must ensure compliance with their tax obligations. Bidders are required to submit their unique personal identification number (pin) issued by sars to enable the organ of state to view the taxpayer's profile and tax status. 1.9.2 Application for tax compliance status (tcs) or pin may also be made via e-filing. In order to use this provision, taxpayers will need to register with sars as e-filers through the website www.sars.gov.za . 1.9.3 In quotations where consortia / joint ventures / sub-contractors are involved, each party must submit a separate proof of tcs / pin / csd number.				

1.9.4 Where No Tax Compliance status (TSC) or pin is available but the bidder is registered on the Central Supplier Database (CSD), a CSD number must be provided.			
1.10 The bidder has examined the information provided in the bid documents and x sizeer to undertake the work prescribed in accordance with the requirements as set out in the bid document. The prices quoted in this bid are valid for the stipulated period. Bidder must confirm the availability of the proposed team members. The bidder confirm that this bid will remain binding upon us and may be accepted by you at any time before the expiry date			
1.11 TKZN's business of conduct and ethics: 1.11.1 Relationships with customers and suppliers - To ensure that they remain objective, employees should not accept any bribes offered by any customer or supplier of TKZN, should report such offers to management and refrain from having any vested interest, financial or otherwise, with any customer or supplier.			

B. ADMINISTRATIVE COMPLIANCE

<u>2. STAGE ONE: ADMINISTRATION COMPLIANCE</u>	Yes	No	Noted	If no, indicate deviation
<p><i>All quotations duly lodged will be examined to determine compliance with bidding requirements and conditions. Quotations with obvious deviations from the requirements/conditions, will be eliminated from further adjudication.</i></p> <p>2.1 Mandatory</p> <p>Quotations will be considered compliant if the following documents have been submitted or condition met (whichever is applicable)</p> <p>2.1.1 The bidder must be registered as a vendor on the National Treasury Central Supply Database (CSD), which can be found at https://secure.csd.gov.za/ in compliance with National Treasury compliance paragraph 4.2 with instruction note 4a of 2016/2017</p> <p>2.1.2 The bidder must be in good standing with SARS and such information will be verified through Central Supply Database using SARS e-filing pin in National Treasury compliance (CSD) or u with instruction note 9 of 2017/2018 prior to the award of the bid;</p> <p>2.1.3 SBD 4 - A completed and duly signed declaration of Interest. Should a conflict of interest be declared or identified, the bid would be declared non- responsive. NB Bidder must ensure all pages are complete and all questions answered, you are to indicate not applicable (N/A) where appropriate.</p> <p>Failure to provide any mandatory information as requested above will result in the submission being deemed non-responsive.</p>				
<p>3. STAGE TWO: PRICE AND PREFERENTIAL/SPECIFIC GOALS – 20 points for preference are allocated on the basis of specific goals in line with the framework set out in the PPPFA. This bid will be evaluated using the 80/20 preference point system. 80 for price and 20 for preferential/specific goals.</p>				

3.1 Price and Preferential/Specific goals evaluation will be carried out on bidders who qualified in stage Stage 1 of the evaluation (Mandatory requirements)			
3.2 In line with Preferential Procurement Regulations 2022 and TKZN Supply Chain Management Policy, A bidder will qualify for preference points (where applicable). Bidders are required to submit the following documentation to claim points for specific goals in terms Historically Disadvantaged Individuals: <ul style="list-style-type: none"> a) 51% or more Black Ownership - 5 points b) 51% or more Black Women Ownership – 10 points c) The promotion of enterprises located in South Africa- 3 points d) The promotion of enterprises located in KwaZulu-Natal- 2 points 			
<i>The following may be used as proof for claiming preference points:</i>			
<ul style="list-style-type: none"> • BBBEE Affidavit • BBBEE Certificate • CIPC • CSD Full Registration Report • SA ID document • A stamped letter from the local councillor or municipal utility bill or Lease Agreement 			
4. ADJUDICATION OF BID			
4.1 The quotation shall be awarded at the sole and absolute discretion of TKZN. TKZN hereby represents that it is not obliged to award this quotation to any bidder. TKZN is entitled to retract this quotation at any time as from the date of issue. TKZN is not obliged to award this quotation to the bidder that quotes the lowest.			
4.2 A bidder shall be disqualified from bidding if any attempt is made either directly to solicit and/or canvass any information from any employee or agent of TKZN regarding this quotation from the date the x sizeer is submitted until the date of award of the quotation.			
5. Awarding of contract			
5.1 The TKZN Service Level Agreement will be the only contract signed by both parties and will form the basis of this contract. TKZN's standard terms and conditions will not be negotiated.			
5.2 TKZN reserves the right to award this quotation in full or part			

C. SPECIFICATION/ TERMS OF REFERENCE

TERMS OF REFERENCE:

BUSINESS EVENTS – NOT JUST THE ECONOMICS

APPOINTMENT OF A SERVICE PROVIDER TO MEASURE THE SOCIAL IMPACT OF BUSINESS

TOURISM FOR THE PROVINCE OF KWAZULU-NATAL

1. BACKGROUND

1.1. The KwaZulu-Natal Tourism Authority (TKZN) is established in terms of the KwaZulu-Natal Tourism Act of 1996, as amended Act No 2 of 2001. TKZN has been established to initiate, facilitate, coordinate and implement:

- Strategic Tourism Marketing;
- Demand driven Tourism Development programs, which will grow tourism, thereby striving to achieve the transformation of the tourism sector (MICE Meetings, Incentives, Conferences and Exhibitions) within the Province and;
- The provision of economic benefits to all stakeholders and the Province.

The KwaZulu-Natal Convention Bureau is a body dedicated to promoting and marketing the regions' many business events facilities, capabilities, and assets, both nationally and internationally.

The Convention Bureau provides Pre and Post bid assistance, Congress/convention planning support, engagements with key stakeholders, bid presentation assistance, site inspections and educational trips, pre and post tours and social events, delegate boosting among other services.

Legacy can be defined as a long-lasting impact of an event that has taken place. Studies in the Business Events sector have primarily focused on the legacy of the spending patterns, the economic benefit that a conference/congress has had on a destination.

KZN has hosted some significant congresses in the past and will do so in the future, TKZN would like to measure the impact of these congresses beyond the economics.

2. PURPOSE OF THE TERMS OF REFERENCE (TOR)

2.1. The purpose of this TOR is to appoint a service provider from interested, qualified, accredited research entities, with a proven track record in this area, to undertake research:

To track the transfer of knowledge and capacity building of conferences/congresses through:

- The tracking of adopted resolutions taken at conferences by relevant stakeholders in the destination
- The impact of the MICE sector on the policy of relevant stakeholders in the destination
- The impact of the MICE on the actions of relevant stakeholders in the destination, i.e. the impact of community projects, impacts on teaching and learning, adoption of new techniques/methods etc.
- The impact of MICE events on the sustaining/creation of jobs
- The economic impact of MICE Events, from a demand and supply-side perspective

3. Scope of Work

The Impact Assessment is divided into the following functional areas:

- 3.1.1 Planning Phase-** Development of a proposal illustrating the aim, objectives, desktop research and data collection methods and sampling techniques, deliverables and timelines.
- 3.1.2 Data Collection and Analysis-** Collation of both primary and secondary data for analysis. This includes interviews.
- 3.1.3 Meetings-** Regular meetings attendance as and when required.
- 3.1.4 Reporting and Presentation-** Furthermore, presentation of preliminary and final results.

4. DELIVERABLES

- 4.1. The successful service provider shall be expected to deliver the following:

The study would need to:

- Create a database of MICE events that took place in KZN in the previous 5 (five) years to use for the study.
- Identify, if any, the resolutions, relating to the implementation of legacy projects that have been adopted at conferences/ meetings. Establishing contact with various bodies in the sector, such as SAACI, CTO's, SITE, PCO's, EXXO, would be required.
- Determine if these resolutions have been carried out, how, when and their progress.
- The adoption and implementation of new ideas/methods exposed to at conferences/meetings i.e. the impact of new knowledge gained as a result of the conference/ meeting.
- Any pitfalls encountered in the adoption/implementation/taking on board new information/methods.

5. PROGRESS REPORTING

- 5.1.1 Provide regular progress reports to ensure that monitoring of performance and progress in terms of data collection and analysis phases.
- 5.1.2 Summary of activities undertaken and the process in meeting deliverable/s;
- 5.1.3 Deliverable for month to be attached to the report;
- 5.1.4 Deliverable achieved since last report;
- 5.1.5 Project financial status;
- 5.1.6 Issues and risk that may affect timescales or deliverables.

6. KNOWLEDGE, QUALIFICATIONS AND EXPERIENCE

- 6.1. The service provider must provide TKZN with a Lead Researcher/Project Manager who has obtained the following qualification and experience:
 - a. Minimum of a honours degree in any related field of Tourism, Social Science, Management Sciences, Economics, Statistics, Marketing.
 - b. Minimum of a least five completed impact studies in any of related fields Tourism, Social Science, Management Sciences, Economics.
 - c. Program Monitoring and Evaluation

- d. Excellent communication and report writing skills.

7. SERVICE STANDARDS AND QUALITY

- 7.1. TKZN reserves the right to review as it deems appropriate the level of service received from the service provider.
- 7.2. The service provider must declare any interest it has in an assignment as well as declare any possible conflict of interest with TKZN in the pursuance of the proposed assignment.
- 7.3. Should any conflict of interest be discovered during the assignment, TKZN reserves the right to summarily cancel the agreement and demand that all information, documents and property of TKZN be returned.

8. CONTRACT DURATION

- 8.1. The duration of the contract will be 60 days from the date of appointment.

9. BIDDER REQUIREMENTS

- 9.1. Bidders must submit a company profile which includes related company experience.
- 9.2. Bidders must provide proof of conceptual grasp indicating a clear understanding of various tasks to be performed in the successful completion of the project.
- 9.3. Bidders must demonstrate the ability of the individual/professional team to render the services and the expertise of key staff members by providing CVs of the support team.
- 9.4. Bidders must provide reference letters as proof of successful completion of similar projects in the last five (5) years from current/pervious clients.
- 9.5. Bidders must provide a project workplan detailing work program outlining deliverables and timelines of various workflow tasks required for this project.
- 9.6. Bidders must provide information on suggested methodology, which should include a suggested sampling framework and proposed tools that would be relevant.

10. SPECIAL CONDITIONS

- 10.1. TKZN reserves the right to reject any proposal found to be inadequate or non-compliant to the Terms of Reference.
- 10.2. Bidders should demonstrate knowledge of TKZN's activities.
- 10.3. The successful bidder may be required to sign a Service Level Agreement (SLA) with the TKZN.
- 10.4. The successful bidder may not assign, in whole or in part, any of its obligations to perform in terms of the contract to any third party, unless the Chief Executive Officer has prior to the assignment, consented in writing to the assignment.
- 10.5. The successful bidder may not intend to cede its right to payment in terms of a contract to a third party without the prior written consent of the CEO. A bidder may not by means of cession, cede any of his obligations to perform in terms of a contract to any third party.
- 10.6. The bidder(s) must formally indicate any objection the bidder(s) may have in making available, on request by the TKZN all working papers, data, documents, reports and evidence collected or prepared during the planning, execution and reporting of the assignment.

11. RFQ REQUIREMENTS

11.1. Standard bid documentation

All bidders are required to complete the Standard Bid Documentation. Failure to do so may render the bid nonresponsive.

11.2. Technical proposal

The technical proposal should comprise the following elements:

- Understanding of the assignment and scope of work.
- Experience of the service provider including relevant track record, reputation, references letters on letterhead of clients, record of affiliation and experience of conducting similar work.
- Proposed team profile and other key members of the team.
- Detailed project execution plan, including task definition and allocation, project timeframes / timetable and milestones as well as feedback and reporting plan to TKZN.

11.3. Financial proposal

The financial offer must cover the following:

The bidder must provide a detailed breakdown of the financial implications, which should include but not be limited to:

- Budget breakdown as per the project plan.
- Fees must be inclusive of VAT

11.4. Information Contained in this document:

The information/data provided in this document, together with any subsequent issue of addenda of information/data is given in good faith for the guidance of applicants. No warranties or representations are given regarding accuracy or completeness of such information.

11.5. Further information

The Tourism KwaZulu-Natal reserves the right to seek further information from the applicants, as it considers necessary.

12. INTELLECTUAL PROPERTY RIGHTS

12.1. It must be noted that KwaZulu-Natal Tourism Authority will have unlimited access to all documents and processes applied by the successful bidder during and after the completion of the project at hand.

12.2. An appointment will be made in terms of the SCM policy of Tourism KwaZulu-Natal.

12.3. Please note: No proposals will be accepted after the closing time.

13. INTELLECTUAL PROPERTY RIGHTS INDEMNITY

13.1. The Bidder undertakes to obtain the necessary consent proprietors or their licenses should the Bidder make use of the intellectual property of any other person.

13.2. The Bidder hereby indemnifies Tourism KwaZulu-Natal against any action, claim, damage or legal cost that may be instituted against Tourism KwaZulu-Natal on the ground of an alleged infringement of any copyright or other intellectual property right in connection with the work outlined with this bid.

13.3. The Bidder further indemnifies Tourism KwaZulu-Natal against any claim or action (including costs) caused by and/or arising from the failure to obtain such consent.

13.4. All original drawings and documents received from Tourism KwaZulu-Natal together with all other drawings, including photographic reductions and negatives thereof, computer programs and other data prepared by the Bidder in connection with the work with prior approval and at the expense of Tourism KwaZulu-Natal, shall be lodged together with any software and/or intellectual property rights in relation thereto with Tourism KwaZulu-Natal and become the property of Tourism KwaZulu-Natal. Bidder shall not make any of the data, details, drawings or information available to any third party, for whatever reason, without prior written approval of Tourism KwaZulu-Natal and shall take the necessary steps to safeguard against this happening.

13.5. Copyright of all documents prepared by the Bidder in terms of this bid shall be owned by TKZN and TKZN shall have unlimited access and free use of the material as and when required.

12. EVALUATION METHOD

Selection will be conducted over three stages as detailed below:

- 10.1. Stage 1 - Compliance with Administrative Compliance
- 10.2. Stage 2 - Functionality
- 10.3. Stage 3 - Price and Specific Goals

12.1. The evaluation criteria for functionality shall be as per the tables below:

Criteria for Evaluation	Maximum Score
COMPANY COMPETENCY AND CAPACITY Company Experience: Bidders must submit a company profile which includes company experience in the implementation and successful completion of relevant and applicable work. <ul style="list-style-type: none"> • 0 – 5 years' experience – 5 points • 6 – 10 years' experience – 10 points • Over 10 years' experience – 15 points 	15
COMPANY COMPETENCY AND CAPACITY- 30 POINTS To score points bidders must submit positive reference letters of current and previous work done, NB: The reference letter must have a: <ul style="list-style-type: none"> • Full description of the project / Project Type • Name of the Client and their representative contract details • Role played in the project. 	20
Six (6) or more positive reference from contactable clients = 20 points	
Five (5) positive reference from contactable clients = 10 points	
Three (3) more positive reference from contactable clients = 5 points	
Less than three or No positive reference letter = 0 points	

Criteria for Evaluation	Maximum Score
<p>Key Team Personnel</p> <p>Research Expertise of Project Manager/Lead Researcher</p> <p>Demonstrate technical as well as professional skills and ability of the Research Manager to render the service. This must be supported with a submission of CV of the project manager reflecting their applicable qualifications and experience.</p> <p>Research Qualification or equivalent of the Project Manager/Lead Researcher</p> <p>a) Masters degree in Tourism, Social Science, Management Sciences, Economics, Statistics, Marketing or equivalent certification in the subject areas listed in 6.3 /NQF9 qualification = 20 points</p> <p>b) Honours in Tourism, Social Science, Management Sciences, Economics, Statistics, Marketing or equivalent certification in the subject areas listed in 6.3 QF8 qualification = 10 points</p> <p>c) No Honours degree or equivalent certification in the subject areas listed in 6.3 NQF8 qualification =0 points</p>	20
<p>Research Expertise of Lead Researcher Manager</p> <p>Years of relevant experience in conducting Tourism research.</p> <p>a) 9 years and more experience = 15 points</p> <p>b) 7-8 years' experience = 10 points</p> <p>c) 5-6 years' experience = 5 points</p> <p>d) Less than five years' experience = 0 point</p>	15
<p>Research Expertise of Second Researcher in Charge</p> <p>Demonstrate technical as well as professional skills and ability of the Second Researcher to render the service. This must be supported with a submission of CV of the project manager reflecting their applicable qualifications and experience.</p> <p>a) 9 years and more experience = 10 points</p> <p>b) 7-8 years' experience = 5 points</p> <p>c) 5-6 years' experience = 3 points</p> <p>d) Less than five years' experience = 0 points</p>	10
<p>The proposal should clearly show how the service provider will conduct the detailed market assessment, design development and comprehensive business planning regarding the practical methodology to be used.</p> <ul style="list-style-type: none"> • Clear approach that demonstrates the understanding of the project objectives • Detailed outlining of tasks • Clear and realistic timelines, project tracking and communication tools (project timeline with milestone • Coherence in the overall project and implementation. • Provide a stakeholder mapping. 	20

Criteria for Evaluation	Maximum Score
<ul style="list-style-type: none"> Proposal shows clear understanding of the terms of reference, clear on how results will be achieved but does not provide sufficient proof of ability to achieve these (past successes, letters of intent, etc.) = 20 points 	
<ul style="list-style-type: none"> Proposal shows understanding of terms of reference but not clear on how results will be achieved on the proposed constructs = 10 points 	
No proposal/ proposal reflects poor understanding of the terms of reference = 0 point	
Total Score	100
Minimum qualifying score: A bidder scoring below 70 points in quality will be considered as disqualified for evaluation and will be discarded from any further evaluation.	

D. PRICING SCHEDULE

Activity	Amount (R)
Creation of the sampling framework	
Data collection	
Data capturing	
Analyses and Report writing	
Other	
Sub-total	
VAT (applicable taxes)	
Total (Incl. VAT)	

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.

2. 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.

2.2 Do you, or any person connected with the bidder, have a relationship

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.

SBD4

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**

2.3.1 If so, furnish particulars:

.....
.....

3 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 the bidder with any official of the procuring.

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.

SBD4

institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

3.6 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.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

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

SBD 6.1

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 To be completed by the organ of state

(delete whichever is not applicable for this tender).

- a) The applicable preference point system for this tender is the **90/10** preference point system.
- b) The applicable preference point system for this tender is the **80/20** preference point system.
- c) Either the **90/10 or 80/20 preference point system** will be applicable in this tender. The lowest/highest acceptable tender will be used to determine the accurate system once tenders are received.

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 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	
SPECIFIC GOALS	
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

3.1.1 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
--------------	-----------	--------------

$$Ps = 80 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right) \text{ or } Ps = 90 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender under consideration

3.2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

3.2.1. POINTS AWARDED FOR PRICE

A maximum of 80 or 90 points is allocated for price on the following basis:

80/20

or

90/10

$$Ps = 80 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right) \text{ or } Ps = 90 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmax = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:

4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—

(a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or

(b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,

then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

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

(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.

Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
51% or more Black Ownership	5 points	
51% or more Black Women Ownership	10 points	
The promotion of enterprises located in KwaZulu-Natal	3 points	
The promotion of enterprises located in South Africa	2 points	

DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name of company/firm.....

4.4. Company registration number:

4.5. **TYPE OF COMPANY/ FIRM**

- Partnership/Joint Venture / Consortium
- One-person business/sole property
- Close corporation
- Public Company
- Personal Liability Company
- (Pty) Limited
- Non-Profit Company
- State Owned Company

[TICK APPLICABLE BOX]

4.6. 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: