

PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE GOVERNMENT TECHNICAL ADVISORY CENTRE (GTAC)					
BID NUMBER:	GTAC 024-2023-24	CLOSING DATE:	30 JANUARY 2024	CLOSING TIME:	11:00AM
DESCRIPTION	PROVISION OF COMMUNICATION, MARKETING SOCIAL MEDIA AND KNOWLEDGE MANAGEMENT SERVICES TO THE GOVERNMENT TECHNICAL ADVISORY CENTRE				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
GTAC TENDER BOX					
240 MADIBA STREET (CORNER THABO SEHUME STREET AND MADIBA STREET), PRETORIA					
NATIONAL TREASURY BUILDING: GOVERNMENT TECHNICAL ADVISORY CENTRE (GTAC)					
GROUND FLOOR, RECEPTION AREA, GTAC TENDER BOX.					
BIDS MUST NOT BE DEPOSITED IN TENDER INFORMATION CENTRE (TIC) TENDER BOX					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Lebakang Mogale		CONTACT PERSON	Lebakang Mogale	
TELEPHONE NUMBER	012 315 5280		TELEPHONE NUMBER	012 315 5280	
FACSIMILE NUMBER	-		FACSIMILE NUMBER	-	
E-MAIL ADDRESS	psp@gtac.gov.za		E-MAIL ADDRESS	psp@gtac.gov.za	
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 OF REFERENCE

PROVISION OF COMMUNICATION, MARKETING SOCIAL MEDIA AND KNOWLEDGE MANAGEMENT SERVICES TO THE GOVERNMENT TECHNICAL ADVISORY CENTRE

BACKGROUND INFORMATION

Programme Identification

Contracting Authority	Government Technical Advisory Centre (GTAC), National Treasury
Accountable Officer and Budget Manager	Ms Elaine Venter – Chief Director: Strategy Management and Communication
Project Purpose	To provide strategic communication, marketing, social media and knowledge management services to the Government Technical Advisory Centre.

1 Introduction

The Government Technical Advisory Centre (GTAC) currently has limited in-house capacity to implement its strategic communication, knowledge management and marketing plans and is therefore looking to contract a professional service provider or communication and marketing company to provide strategic communication, knowledge management and marketing services. The contract period is for three years, reviewable annually based on performance.

The successful service provider company will ensure the effective and professional implementation of GTAC's corporate communication and knowledge management strategy, raise awareness of and promote GTAC's business among its stakeholders by applying diverse and innovative methodologies to implement the identified communication and knowledge management activities as required. The service provider will also be required to produce promotional material for virtual and normal conferences, workshops and events. The service provider will be managed by GTAC's Strategy Management and Communication (SMC) business unit.

Prospective service providers with the necessary expertise and experience are requested to provide a comprehensive proposal demonstrating their experience, capacity and technical expertise as well as provided a Resource Matrix (see Annexure B), and a cost estimate to deliver the services outlined in this document (see Annexure C). The service provider should demonstrate an understanding of strategic communication, knowledge management and marketing with an emphasis on utilising appropriate media platforms as required. Please refer to Annexure A1 and A2, which is encouraged and should be completed as part of the tender submission.

2 Background and Context

The Government Technical Advisory Centre (GTAC) was established by National Treasury to consolidate advisory and support activities via a dedicated, central unit of skilled staff and advisors. The intention was to establish a government centre, which could respond flexibly and professionally to service delivery constraints in the public sector, by deploying technical and advisory expertise as needed. The main benefits of establishing such an independent advisory centre are (1) to improve service delivery through a single-entry point; (2) to improve governance; and (3) to enhance the quality of public services.

GTAC's vision is therefore to serve as a creative centre of excellence offering public sector support and promoting learning and co-operation for improved financial management and

service delivery. This vision is underpinned by the imperative to effectively communicate, share information and create opportunities for learning across the public sector.

2.1 Mandate

GTAC's functioning is framed within a set of well-defined and forward-looking legal frameworks, the first of which is the Constitution and its Founding Notice as the most directly applicable.

GTAC's Founding Notice, Government Notice 261, Government Gazette 35194, of March 2012, gives effect to its mandate to "assist Organs of State in building their capacity for efficient, effective and transparent financial management".

The functions of GTAC are:

- To render technical consulting services to Centre of Government Departments and Organs of State.
- To provide specialised procurement support for high-impact government initiatives.
- To render advice on the feasibility of infrastructure projects.
- To provide knowledge management for projects undertaken; and anything ancillary to these functions.

Partnerships form the basis of its development methodology across government, with the private sector, the academic and research community, and civil society stakeholders. In principle, GTAC's capacity building is based on partnerships and learning by doing. "Better public finance management rests on pragmatic and problem-solving methods, learning through innovation, and transferring skills through collaboration and partnerships."

GTAC is therefore well placed to contribute to improved performance of the public sector given its mandate, model of delivery and emphasis on value for money. The focus on institutionalising effective knowledge management and shared learning platforms is an important lever through which GTAC is able to deliver on its value proposition of being customer-centric, efficient and a valued partner for organs of state.

As GTAC works in a number of sectors and disciplines, it requires access to strategic communications, knowledge management, marketing and social media expertise to promote and strategically position itself in the public sector, as well as deliver efficiencies of scale.

3 Scope of Work

Role – Strategic Communication, Knowledge Management, Marketing and social media Team

3.1 Scope

The service provider should be a turnkey service in strategic communication, knowledge management, marketing and social media expertise to GTAC. This includes responding to internal communication and coordination support with GTAC's knowledge hubs which have been established. As well as externally focused on social media and communication support to strengthen, promote and expand GTAC's branding and visibility among its stakeholders.

4 Request for Assistance

4.1 Overall Objective

The appointed service provider will:

- Review, refine and further develop GTAC's corporate communication and knowledge management strategies including all marketing, communication, capacity building, sharing, learning and promotional material.
- Refine and implement the communication and knowledge management plans and activities in line with GTAC's business development strategy.
- Redesign and implement a marketing plan, utilising a comprehensive and innovative suite of marketing tools, with an emphasis on digital and social media platforms.
- Write thought leadership articles, provide editorial and content management support as well as knowledge management support to promote and raise awareness of GTAC's work and its valued role in the public sector.
- Provide both strategic communications and knowledge management advisory support and direction.
- Provide layout, design and printing support as needed; and
- Any other related service required by GTAC within the diverse space of communication and marketing as it arises.

GTAC will maintain a hands-on approach throughout the contract. As such, the successful service provider will liaise closely with GTAC's Strategy Unit to provide coordination for all work. Maintaining a trusted and sound working relationship will be key to the success of this contract. Confidentiality will be a priority and the service

provider will be required to sign a non-disclosure agreement (NDA) before any work commences.

The service provider is required to submit the following reports:

- Inception report including a detailed work plan and reporting schedule. The format to be agreed in advance with GTAC.
- Proof of deliverables, project documents and/or project outcomes. This must also accompany all invoices as proof of work done.
- Progress between milestones reports (concise, 1-page reports emailed to the project manager). These will be agreed upon as either monthly or weekly 'Friday reports' on progress/ hurdles on the deliverables.
- Delivery of specific milestones: After every deliverable, reconcile expenditure against the contract budget as part of budget tracking.
- Ad-hoc reports within agreed timeframes; and
- Contract close-out report to be submitted at least 3 weeks prior to the contract end date.

Contract requirements include:

- Delivery of the highest standard in terms of quality, timeous delivery and within budget.
- All GTAC artwork, images or graphics to be provided to GTAC in an electronic format (USB) as well as in an editable format for future use if necessary; and
- A very high standard of quality and professionalism at all times. The SMC business unit will monitor quality standards of all outputs.

4.2 Main tasks to be performed.

Strategic communication

- Review, refine and implement the corporate communication strategy.
- Develop content/publications to raise awareness of GTAC'S internal and external programmes.
- Advise on strategic matters which impact the business of GTAC and its clients.
- Coordinate, edit, produce and distribute publications as agreed in the annual work plan.
- Editing, layout and design of mandatory reports and other reports/ publications
- Produce written deliverables, including articles, press communiqués, dossiers, and content for events, public speaking notes and related media and communication material.

Knowledge Management

The Knowledge Management (KM) function in GTAC includes knowledge generation and dissemination, where dissemination is widely understood to include the design of a learning institution which emphasizes innovation and capacity development. The Knowledge, Innovation and Capacity (KIC) nexus is therefore fully recognised as a critical ingredient to build a high performing, sustainable and adaptable GTAC. GTAC has a specific mandate to institutionalise and prioritise KM as a mechanism for building an institutional repository, promoting innovation and supporting capacity development. Therefore, the service provider will be required to:

- Update and implement a knowledge management strategy to prioritise and position GTAC strategically to be a Centre of Excellence with innovation and intelligence.
- Manage the GTAC Knowledge Hub.
- Institutionalise knowledge management within GTAC.
- Develop a knowledge sharing and learning culture.
- Improve GTAC's internal technical advisory support function through knowledge management initiatives.
- Develop knowledge management skills and competencies.

Marketing and branding

- Update, redesign and implement an appropriate marketing strategy given GTAC's status as a component of the National Treasury
- Design and manage production of content for GTAC's branded promotional and marketing material (banners, brochures, cheat sheets, programmes, lanyards, lanyard pouches, pens, USBs, folders, files, etc., as required).

Social media

- Update and redevelop, implement and optimize the social media strategy including regular blogs, vlogs, and update and maintain all GTAC's social media platforms, including community management including monthly social media reports.

Digital: Virtual learning and E-conferencing and other software licenses

- Develop, manage, procure and implement the necessary platforms/software to enable GTAC to host and have virtual learning sessions or e-conferencing events.

- Manage existing subscriptions: – such as Mailchimp, Zoom (meetings and webinars) and Airmeeet.
- Hosting, maintenance and content updates of GTAC WordPress website.
- Develop, manage, procure software licenses on behalf of GTAC to ensure optimal functioning, automation and cutting-edge delivery.

Layout, design and print

- Utilise creative design to translate content into easily accessible material using techniques, such as infographics, etc.
- Co-ordinate and manage any printing requirements.

Any other work-related to marketing, strategic communication and knowledge management services as required.

The service provider may sub-contract additional skills to enhance their service offering when required by GTAC.

The appointed service provider will be required to allocate team members who will deliver the services detailed here.

5 Submission Requirements

Technical Proposal

The service provider must submit the following information as part of the technical proposal:

Company Profile and CVs

A company profile showcasing the combined experience in strategic communication, knowledge management, marketing and branding, digital and social media expertise, and layout and design (printing) with a minimum of 12 years' experience. A comprehensive CV in the requested format is preferable and encouraged (please refer to Annexure A1 and A2) of each of the service provider's team leader and project/core team members:

- Team Leader: It is required for the team leader to have experience with the following criteria: strategic communication, knowledge management; marketing and branding; digital and social media expertise; and layout and design (printing). (Refer to Annexure A1).
- Project/Core Team: It is required for the project team or core team to have experience in the following criteria: strategic communication and knowledge management;

marketing and branding; digital and social media expertise; layout and design (printing) (refer to Annexure A.2).

- The project team is expected to hold the skills sets and expertise as described in 4.2 of the TORs.
- The service provider is required to fill in the Resource Matrix, clearly showing the role, qualification (refer to Annexure B).
- GTAC's expectation is to appoint a team leader from a company who has experience in the identified areas and who will coordinate and project management the entire project/core team as and when the need arises for the project.
- Fee structure and cost estimate (please refer to Annexure C for breakdown of items to quote on). It is acknowledged that this is dependent on a workplan to be finalised at the inception meeting.

CV Requirements of Core team

Education:

- Excellent command of the English language.
- Excellent writing and relevant computing skills.
- Excellent communication and team working skills.

Work Experience:

- At least 8 years' relevant experience directly or indirectly linked to the scope of this assignment.
- Proven professional experience in strategic communication, marketing and social media, including planning, designing, disseminating and implementing strategic communication, knowledge management and marketing strategies. Please provide at least three contracts to showcase work in both the private and public sector.

Skills and Expertise:

The GTAC work will be implemented by a reputable and professional service provider, drawing on, but not limited to, the following knowledge, skills and experience:

The service provider must have the following experience and expertise:

- Proven experience in strategic communication.

- Proven experience in the development, production and printing of different forms of publications/promotional materials and working with social media platforms.
- Experience in technical writing, copy writing/journalism environment, writing articles for newspapers, producing press releases, content editing (including copy editor and proof-reading skills) and healthy relationships with the various media houses.
- Experience in brand management as well as managing the organisational brand and reputation.
- Experience in institutionalising knowledge management within an organisation.
- Experience in developing a knowledge sharing and learning culture within an organisation.
- Experience in social media, with an ability to draw on social bloggers, vloggers, etc. per topic and develop a social media strategy and plan.
- Experience in raising the profile and visibility of an organisation at an event/conference/workshop using social media platforms, digital media, print media, promotional material, etc.
- Experience in story telling through social and visual media (including graphic design, infographics, videos, vlogs, etc.).
- Experience in producing slick, fresh and accessible promotional material and other printed media, including banners, brochures, etc.
- Experience in converting technical content into easily accessible language for policy makers, government officials and the lay person.
- Exceptional eye for detail.
- Experience in editing, layout and design, graphic design, digital and electronic media design and video production.
- Experience in marketing and communication.
- Experience with digital/electronic/social media platforms as well as being technologically savvy including knowledge of the latest artificial intelligence (AI) related to communication.
- Experience in running virtual learning sessions/workshops or e-conferencing events.
- Experience in printing and delivering promotional materials or corporate gifts; and
- Experience in working with tight deadlines and large groups of people.

6 Evaluation Process

Bids will be evaluated in accordance with the evaluation methodology reflected in the table below:

Table 1: Evaluation Methodology

Evaluation Stage	Description
Stage One	<p>Administrative Compliance</p> <p>Evaluation of submission of Standard Bidding documents. Documents must be submitted and duly completed and signed where required (As indicated in Information to Bidders).</p>
Stage Two: Desktop Technical Evaluation	<p>Evaluation of technical proposals.</p> <p>Bidders must submit information as per Bid Submission Requirements. The submitted technical proposal must respond to the Technical Evaluation criteria cited in the Terms of Reference.</p> <p>Bidders must score a minimum threshold of 70 points out of 100 points in order to be considered for Interview process/evaluation.</p>
Stage Two: Interview Evaluation	<p>Selected bidders will be required to attend a session they will present their proposal to panel and thereafter will be interviews. those bidders reaching a minimum threshold of 70% for the interviews will be considered for further evaluation on price and specific goals evaluation.</p>
Stage Three: Price and Specific goals	<p>Price and Specific goals</p> <p>Preference points in the 80/20 formula will be awarded to bidders for attaining a score for specific goals as indicated in below. Bidders must provide the required information for evaluation purposes.</p>

6.1 The evaluation process comprises the following phases:

Stage 1: Initial administration screening process

During this phase bid documents will be reviewed to determine compliance with tax matters and Central Supplier Database (CSD) at closing date and time of bid.

All bid proposals will also be assessed for compliance with the administrative requirements of the bid:

Table 2: Initial administration screening process

No	Administrative Requirements	Requirement
1	Master bid document	Delivery of a hard copy proposal before the closing date and time.
2	Four copies of the Bid document	Provided and bound
Included in the bid document		
3	SBD 1-Invitation to bid	Complete and sign the supplied pro forma document.
4	Tax clearance status: CSD registration report or number/SARS pin	Bidders must be registered on the Central Database System (CSD) at the closing date and time of the bid.
5	SBD 3.3 - Pricing Schedule	Completed and sign the supplied pro forma document.
6	SBD 4 – Bidder’s Disclosure	Completed and signed
<p>Note:</p> <p><i>Bidder’s must submit the attached SBD 4 document. A bid may be disqualified if this disclosure is found not to be true and complete in every respect. The following definitions should be considered when completing the form:</i></p> <ul style="list-style-type: none"> - “Person” means a bidder or supplier or shareholder, director, trustee, partner, member of a bidder or supplier having the controlling interest in the bidder or supplier. - “State” means a national or provincial department, national or provincial public entity or constitutional institution, a municipality or municipal entity, a provincial legislature or parliament. 		
7	SBD 6.1 – Preferential Point Claim form in terms of the Preferential Procurement Regulation (PPR) 2022	Completed and signed

7 TAX CLEARANCE STATUS

A valid tax pin must be provided for purposes of verifying that the tax matters of the bidder are in order and must be submitted at the closing date and time, where consortium/joint ventures/sub- contractor are involved; each party to the association must submit a separate validation of Tax status i.e., Registration number from Central Supplier Database (CSD) must be provided with this bid.

Bidder’s tax matters must be compliant at the time of award. In case where a bidder’s tax matters are non-compliant, a bidder will be given a minimum of seven (7) days to remedy the tax matters. Failure to remedy this will invalidate the bid.

8 MANDATORY REQUIREMENTS

Failure to adhere to any of these requirements will result in disqualification:

- 8.1.1 Bidders must be registered on Central Supplier Database (CSD) on closing date of the tender.
- 8.1.2 Bidder representatives (Director/Shareholder/Proposed Resource) must not be employed by the State.
- 8.1.3 Bidders must submit the required company profile information as prescribed stipulating combined years of experience in the service areas identified in this TOR.
- 8.1.4 Bidders must submit the required information as prescribed Annexure B (Resource Matrix Template). The bidder should indicate the names and the roles of everyone (team composition). This Annexure must be completed in full as per the format. Failure to provide all the information will result in disqualification.
- 8.1.5 CVs unsigned by the respective individuals as well as CVs submitted in more than one bid will be rejected and not be considered for evaluation.
- 8.1.6 Submission of a technical proposal required is required.
- 8.1.7 Submission of price proposal/ financial proposal (SBD 3.3) is required as per Annexure D.

9 OTHER TECHNICAL EVALUATION REQUIREMENTS

Bidders should ensure that the following submission requirements are included in their bid.

Table 3: Other technical evaluation requirements

OTHER REQUIREMENTS
Bidders must submit copies of identity documents of directors or shareholders of the company who will be responsible for this project with the bid documents at the closing date and time of the bid.
Bidders must submit a CV preferably as per prescribed in Annexures A (CV Template), but this will not result in a disqualification. Failure to provide all the information required will affect the score as stipulated in the Evaluation Criteria table.

OTHER REQUIREMENTS

Proof of Qualifications

1. Bidders must provide supporting documentation as proof of educational qualifications as well as all required certificates. All copies must be certified, and the certification must not be older than six (6) months.
2. Please note Certificate of membership shall not be deemed as proof of educational qualification (Education qualifications refers to certifications issued by institutions of high learning e.g., Certificate, diploma, degree, etc.) Non-submission of qualifications will lead to a score of zero for the qualifications' technical criterion (section 2 of the evaluation criteria).
3. All international qualifications must be accompanied by South African Qualifications Authority (SAQA) Accreditation. Non-submission of SAQA confirmation will lead to a score of zero for the qualifications' technical criterion (section 2 of the evaluation criteria).

Price proposal and specific Goals

1. Submission of a price proposal required in the proforma format. (SBD 3.3). Annexure D.
2. Proof of specific goals must be submitted as part of the Price Proposal and must be included in the Price Proposal envelope. Annexure C, proof of specific goals must be submitted as part of the Price Proposal and must be included in the Price Proposal envelope.
3. If there is non-submission, a bidder will obtain a score of zero for specific goals.

10 EVALUATION CRITERIA

Stage Two: Desktop Technical Evaluation

Evaluation will be conducted in accordance with the table below:

Table 4: Desktop Technical Evaluation

No.	Criterion	Scoring		Weight
1	Team Leader			
1.1	Team leader's combined experience with all of the below: <ul style="list-style-type: none">• Strategic communication;• Marketing and branding;• Digital expertise• Social media expertise;	5 = 12 or more years' relevant experience 4 = 9 – 11 years' relevant experience 3 = 6 – 8 years' relevant experience		25

	<ul style="list-style-type: none"> Layout and design (printing); and Knowledge management 	<p>2 = 3 – 5 years’ relevant experience</p> <p>1 = less than 3 years’ relevant experience</p>		
1.2	<p>Team leader’s expertise:</p> <p>Demonstrate overall experience and achievements highlighted above:</p> <ul style="list-style-type: none"> Proven track record on strategic communication and marketing and branding, digital and social media skills; layout, design printing and knowledge management 	<p>5 = Exceptional – (10 or more relevant projects in all the areas identified)</p> <p>4 = Very good – (6-9 relevant projects in all areas identified)</p> <p>3 = Good – (3-5 relevant projects in areas are explained)</p> <p>2 = Below Average - (2 relevant projects in all or some areas identified)</p> <p>1 = Poor – (None of the areas identified)</p>		20
2	Company’s Project Team/ Core Team			
2.1	Demonstrated experience/capability of the service provider/company to develop, implement strategic communication and marketing and branding, digital and social media skills; layout, design printing and knowledge management expertise.	<p>5 = 12 or more years’ relevant experience</p> <p>4 = 9 – 11 years’ relevant experience</p> <p>3 = 6 – 8 years’ relevant experience</p> <p>2 = 3 – 5 years’ relevant experience</p> <p>1 = less than 3 years’ relevant experience</p>		20
2.2.1	<p>Project team’s expertise should be showcased for each specific area below:</p> <p>Strategic communication</p> <p>Please refer to the Resource Matrix provided in Annexure B</p>	<p>5 = Exceptional – (8 or more relevant projects in the area identified)</p> <p>4 = Very good – (5-7 relevant projects in the area identified)</p> <p>3 = Good – (2-4 relevant projects in the area are explained)</p> <p>2 = Below Average - (1 relevant project in areas identified)</p> <p>1 = Poor – (None of the projects in the area identified)</p>		5
2.2.2	<p>Marketing and branding,</p> <p>Please refer to the Resource Matrix provided in Annexure B</p>	<p>5 = Exceptional – (8 or more relevant projects in the area identified)</p>		5

		<p>4 = Very good – (5-7 relevant projects in the area identified)</p> <p>3 = Good – (2-4 relevant projects in the area are explained)</p> <p>2 = Below Average - (1 relevant project in areas identified)</p> <p>1 = Poor – (None of the projects in the area identified)</p>		
	<p>Digital expertise</p> <p>Please refer to the Resource Matrix provided in Annexure B</p>	<p>5 = Exceptional – (8 or more relevant projects in all the areas identified)</p> <p>4 = Very good – (5-7 relevant projects in all areas identified)</p> <p>3 = Good – (2-4 relevant projects in areas are explained)</p> <p>2 = Below Average - (1 relevant project in all or some areas identified)</p> <p>1 = Poor – (None of the areas identified)</p>		5
2.2.3	<p>Social media expertise</p> <p>Please refer to the Resource Matrix provided in Annexure B</p>	<p>5 = Exceptional – (8 or more relevant projects in all the areas identified)</p> <p>4 = Very good – (5-7 relevant projects in all areas identified)</p> <p>3 = Good – (2-4 relevant projects in areas are explained)</p> <p>2 = Below Average - (1 relevant project in all or some areas identified)</p> <p>1 = Poor – (None of the areas identified)</p>		5
2.2.4	<p>Proposed expert layout, design and printing</p> <p>Please refer to the Resource Matrix provided in Annexure B</p>	<p>5 = Exceptional – (8 or more relevant projects in the area identified)</p> <p>4 = Very good – (5-7 relevant projects in the area identified)</p> <p>3 = Good – (2-4 relevant projects in the area are explained)</p> <p>2 = Below Average – (1 relevant project in areas identified)</p> <p>1 = Poor – (None of the projects in the area identified)</p>		5

2.2.5	Knowledge Management Please refer to the Resource Matrix provided in Annexure B	5 = Exceptional – (8 or more relevant projects in the area identified) 4 = Very good – (5-7 relevant projects in the area identified) 3 = Good – (2-4 relevant projects in the area are explained) 2 = Below Average - (1 relevant project in areas identified) 1 = Poor – (None of the projects in the area identified)		10
Total Score: Technical evaluation				100 points
Total Technical Minimum Threshold for functionality				70 points

Only bidders that have met the threshold of 70% for technical evaluation will progress to Price and specific goals evaluation.

Stage Two: Interview Evaluation

The bidders that meet the minimum threshold in Technical Evaluation above will attend an interview, which will include delivering a presentation to evaluation panel, this process will be used to verify the following:

Table 5: Interview Evaluation

No.	Criterion	Scoring		Weight
Team Leader for				
1	Demonstration of knowledge skills and experiences (use of the latest technology and provide a POE and social media is encouraged in the presentation)	5 = Exceptional (Demonstrated capability significantly above the expected capability level) 4 =Very good (Demonstrated capability exceeds capability) 3 = Average (Demonstrated capability meets the expected capability level) 2 =Below average (Demonstrated capability below the expected capability level) 1 = Poor (Demonstrated capability is significantly below expected capability level)		40

2	Demonstration of the understanding of the ToR (presentation to be made)	<p>5 = Exceptional (Demonstrated capability significantly above the expected capability level)</p> <p>4 =Very good (Demonstrated capability exceeds capability)</p> <p>3 = Average (Demonstrated capability meets the expected capability level)</p> <p>2 =Below average (Demonstrated capability below the expected capability level)</p> <p>1 = Poor (Demonstrated capability is significantly below expected capability level)</p>		60
Total Score: Technical evaluation				100 points
Total Technical Minimum Threshold for Interviews				70 Points

Stage 3: Price and Specific Goals evaluation

PREFERENTIAL PROCUREMENT EVALUATION BASED ON 80/20 PRINCIPLE

A maximum of 20 points may be awarded to a tenderer for the specified goals envisaged in section 2(1)(d) and (e) of the Act. The points scored must be rounded off to the nearest two decimal places. Subject to regulation 9, the contract must be awarded to the tenderer scoring the highest points. Below is the terminology used for specific goals:

Table 6: Terminology

Terminology	Definition
Black People	As per the Broad-Based Black Economic Empowerment Act 53 of 2003 as Amended by Act No 46 of 2013 "Black People" is a generic term which means Africans, Coloureds and Indians – (a) who are citizens of the Republic of South Africa by birth or descent; or (b) who became citizens of the Republic of South Africa by naturalisation before 27 April 1994; or II. on or after 27 April 1994 and who would have been entitled to acquire citizenship by naturalization prior to that date.
Specific goals	means specific goals as contemplated in section 2(1)(d) of the Act which may include contracting with persons, or categories of persons, historically disadvantaged by unfair discrimination on the basis of race, gender and disability including the implementation of programmes of the Reconstruction and Development Programme as published in <i>Government Gazette</i> No. 16085 dated 23 November 1994;

Historically Disadvantaged Individual (HDI)	<p>means a South African citizen:</p> <ol style="list-style-type: none"> 1. who, due to the apartheid policy that had been in place, had no franchise in national elections prior to the introduction of the Constitution of the Republic of South Africa, 1983 (Act No 110 of 1983) or the Constitution of the Republic of South Africa, 1993, (Act No 200 of 1993) ("the interim Constitution); and/or 2. who is a female; and/or 3. who has a disability. <p>provided that a person who obtained South African citizenship on or after the coming to effect of the Interim Constitution, is deemed not to be an HDI;</p>
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Table 7: Specific Goals evaluation

Number of points allocated (80/20 system)	
Price	80
The specific goals in terms of this tender	20
Above 30% ownership for Historically Disadvantaged Individuals who had no franchise in national elections before the 1983 or 1993 Constitutions.	6
Women percentage of ownership: 30% and above	10
Disability percentage of ownership: 30% and above	2
Youth percentage of ownership: 30% and above	2
Total of specific goals	20
Overall Total	100

11 Duration

The contract period is for three years.

12 Location

The resources will be required to work closely with the SMC team and be available to attend meetings regularly at GTAC offices 240 Madiba Street, Pretoria CBD or virtually on MS Teams.

13 Bid Validity

The bid will be valid for a period of ninety (90) days.

14 Disclaimers

GTAC reserves the right not to appoint any service providers. GTAC reserves the right to appoint more than one service provider for selected aspects of the project should a single

service provider not address all the components required, although this is the less desirable option.

15 Intellectual Property Rights

The service provider assigns to GTAC the Intellectual Property rights in all present and future works of which the service provider may be the author, which works were or are created, compiled, devised, or brought into being during the course and scope of the service provider's rendering of services to GTAC. No consideration shall be payable by GTAC to the service provider in respect of intellectual property rights relating to this assignment.

All artwork, videos, publications, reports, manuals, budgets, indices, research papers, letters or other similar documents (the nature of which is not limited by the specific reference to a foregoing items) which are created, posted, compiled or devised or brought into being by the service provider or come into the service provider's possession during the course and scope of this Agreement, and all copies thereof, shall be the property of GTAC. Upon the date of termination of this Agreement, or earlier if required by the GTAC, such documents and all copies shall be returned to GTAC.

On termination of the Agreement, the service provider shall deliver to GTAC all property in the service provider's possession or under its control belonging to GTAC or created in pursuance of the service provider's duties in terms of this assignment including, without limiting the generality thereof, documents, publications, videos, drawings, plans, reports, data sheets and USBs.

16 Training and skills transfer

Service provider is required to do training and skills transfer twice a year with the identified GTAC officials for the duration of their contract.

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.

Full Name	Identity Number	Name of State institution

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.

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.

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

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

- a) The applicable preference point system for this tender is the **80/20** preference point system.
- b) **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	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

3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

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

80/20

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

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

- 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: 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.)

Failure to claim points on this section or non-submission of evidence would result in a score of 0.

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)
Above 30% ownership for Historically Disadvantaged Individuals who had no franchise in national elections before the 1983 or 1993 Constitutions.	6	
Women percentage of ownership: 30% and above	10	
Disability percentage of ownership: 30% and above	2	
Youth percentage of ownership: 30% and above	2	
Total	20	

NB* Bidders may refer to paragraph 10 (stage 3) of the Terms of Reference (ToR) for preferential procurement evaluation.

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 propriety
 - 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: