

REQUEST FOR QUOTATION (RFQ) FOR THE IMPLEMENTATION AND ADMINISTRATION OF PHASE 1 OF THE INTEGRATED MARKETING AND COMMUNICATIONS STRATEGY OF THE ISAM200 – CAMPAIGN LAUNCH - ON BEHALF OF IZKO MUSEUMS OF SOUTH AFRICA.

| | |
|---|--|
| Reference Number | IZIKO -RFQ Marketing 2025/01/27 |
| Description | Suitably experienced service providers are invited to submit quotations for the implementation and administration of phase 1 of the integrated marketing and communications strategy of the ISAM 200 – campaign launch on behalf of the Iziko Museums of South Africa. |
| Address | Iziko South African Museum, 25 Queen Victoria Street, Cape Town, 8001 |
| Attention | Noleen Donson and Siphamandla Oupa |
| Issued Date | 03 February 2025 |
| Closing date and time for submission | 12 February 2025 @ 11:00am |
| Method of delivery | Quotes / Proposals, and accompanying documentation, must be emailed to (SCM) 021 481 3917: & 021 481 3889 ndonson@iziko.org.za and scm@iziko.org.za |
| Technical enquiries | Melody Kleinsmith on 021 481 3858 or via email mkleinsmith@iziko.org.za |

| | |
|--|--|
| Name of Company | |
| CSD Supplier Number (MAAA.....Number) | |
| B-BBEE Status Level of Contribution | |
| Quote Price (Incl Vat) | |
| Signature | |

BIDDER'S DISCLOSURE (SBD 4)

1. PURPOSE OF THE FORM (SBD 4)

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 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:

.....
.....

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.

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.
- 3.5 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.
- 3.5.1 There have been no consultations, communications, agreements, or arrangements made by the bidder with any official of the procuring 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 (Company Name)

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.

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**

The applicable preference point system for this tender is the **80/20** preference point system.

- 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 or 90 points is allocated for price on the following basis:

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

Where

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

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:

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

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 | Evidence | 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) |
|--|---|---|---|
| Persons, or categories of persons, historically disadvantaged- (HDI) by unfair discrimination on the basis of race | <ul style="list-style-type: none"> • Proof of B-BBEE certificate; • Company Registration Certification • Identification Documentation. • CSD report | | |
| Race: Black persons (ownership)* 50% or more black ownership = 20 points Less than 50% black ownership = 10 points 0% black ownership = 0 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 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:

.....

.....

.....

SUITABLY EXPERIENCED SERVICE PROVIDERS ARE INVITED TO SUBMIT QUOTATIONS FOR THE IMPLEMENTATION AND ADMINISTRATION OF PHASE1 OF THE INTEGRATED MARKETING AND COMMUNICATIONS STRATEGY OF THE ISAM 200 – CAMPAIGN LAUNCH - ON BEHALF OF THE IZIKO MUSEUMS OF SOUTH AFRICA.

1. Background

Iziko is a schedule 3A public entity and non-profit organisation, partly subsidised by the National Department of Sport, Arts & Culture (DSAC), bringing together 11 national museums and a Social History Centre situated in the Western Cape under a single governance and leadership structure. Iziko was established in terms of the Cultural Institutions Act, 1998 (Act No. 119 of 1998) and is required to comply with the Public Finance Management Act (PFMA), 1999 (Act No. 1 of 1999, as amended) and its concomitant Regulations.

Iziko, an isiXhosa word meaning ‘hearth’, embodies the spirit of a transformed institution and our vision of ‘African Museums of Excellence’. The hearth is traditionally and symbolically the social centre of the home; a place associated with warmth, kinship, and the spirits of ancestors. *Iziko was thus envisaged as a space for all South Africans to gather, nourish body and soul, and share stories and knowledge passed from one generation to the next.* Iziko seeks to celebrate our heritage whilst generating new cultural legacies for future generations, and a society that has moved beyond the shackles of the past.

As African Museums of Excellence, Iziko strives to develop engaging exhibitions, programmes and activities which creates memorable museums experiences that enables visitors to connect, explore and experience our rich cultural heritage in unique ways.

Iziko South African Museum: Celebrating Two Centuries of Pioneering Discovery

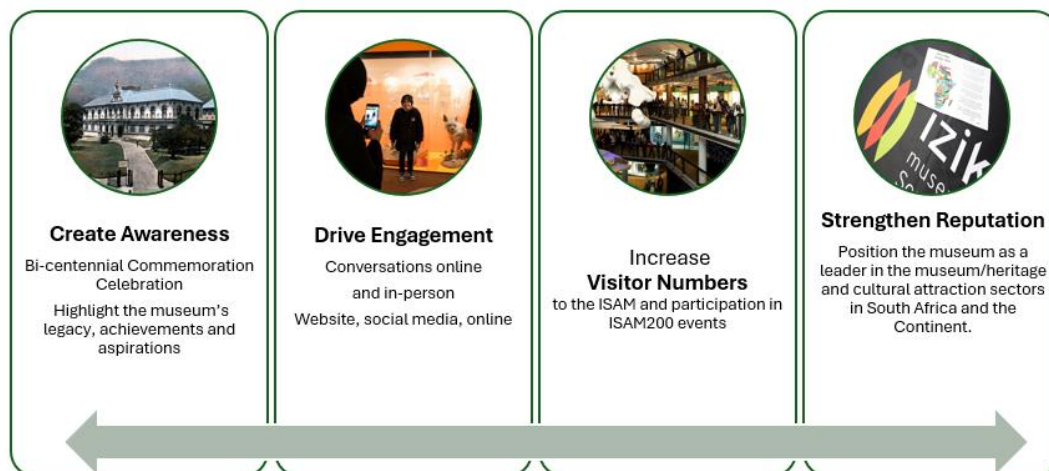
Established in 1825, the Iziko South African Museum (ISAM) stands as one of the oldest museums in sub-Saharan Africa. Its extensive collections and pioneering research, which date back to the early 19th century, form the bedrock of our understanding of Southern Africa's biological and cultural history. As ISAM approaches its 200th anniversary in 2025, it remains a premier institution on the continent, renowned for its exceptional natural and cultural history collections.

The museum’s ongoing commitment to excellence is reflected in its diverse and expansive collections, cutting-edge research, and world-class exhibitions. ISAM’s inclusive educational and public programs further enhance its role as a leading African museum, dedicated to serving a broad audience and advancing knowledge across various disciplines.

In celebration of its bicentenary in 2025, the Iziko South African Museum aims to commemorate 200 years of collecting, interpreting, and making accessible Africa’s natural and cultural heritage. The ISAM 200 anniversary provides Iziko with an opportunity to, among other things, further reimagine Iziko’s exhibitions, collections, educational and public programming to be inclusive, accessible, dynamic and promote social cohesion, nation building and healing.

In preparation of this significant bicentennial commemoration, Iziko Museums intends to launch the Bicentenary on with a staff activation during the week leading up to the media launch and gala event on Thursday, 13 March 2025 as well as a new exhibition opening on 22 March 2025.

The goals of the ISAM 200 campaign are to:



2. Scope of Services

Iziko Museums of South Africa (Iziko) invites suitably experienced service providers are invited to submit quotations for the campaign development, implementation and administration in terms of phase 1 of the integrated marketing and communications strategy of the ISAM 200 strategy – campaign launch.

The service provider will be required to implement the following elements of the campaign implementation within a total budget of R450 000 + Quoted processing fee:

3. BRIEF & SPECIFICATIONS

| Service Required | Description/ Clarification detail/Comment |
|--|---|
| TOTAL BUDGET: R450 000.00 + Quoted processing fee | |
| Public Relations | <ul style="list-style-type: none"> - Create awareness and support for the ISAM 200 - Position Iziko South African Museum - Develop communique (including writing media statements) and formulate messages in support of the ISAM 200 launch - Identify and set-up a series of features proposals for print, broadcast and online - Identify Journalists, bloggers, and social media influencers could add value to the ISAM campaign in order to: <ul style="list-style-type: none"> • Amplifying Iziko's initiatives to reach broader audiences. • Enhance storytelling around exhibitions and events, increasing engagement. • Generate earned media and boosting credibility. • Setting up media engagements to profile, the staff, research and highlights of the Iziko South African Museum. |

| Service Required | Description/ Clarification detail/Comment |
|--|---|
| TOTAL BUDGET: R450 000.00 + Quoted processing fee | |
| Media Launch 13 March 2025 | <ul style="list-style-type: none"> - Plan, coordinate, implement and host a media event to position the ISAM 200 - Generate publicity - Formulate the media launch programme content - Production of ISAM 200 media launch content including but not limited to: - ISAM 200 DL flyer, video and marketing material as agreed to between the parties. |
| Formulate campaign implementation | <ul style="list-style-type: none"> - ISAM 200 marketing campaign activation as agreed to between the parties including design, development and production. - Develop campaign marketing materials and collateral including the new exhibition: <i>The Sea and Us</i> |

4. Compliance Documents

Service Providers must submit all documents as outlined in the **Table** below.

Table 3: Compliance Documents

| | |
|---|--|
| 1 | Central Supplier Database Report – with supplier number and company details (www.csd.gov.za) |
| 2 | Tax Status Verification Pin together with tax registration number. |
| 3 | Detailed pricing structure: A cost schedule detailing full cost breakdown, inclusive of VAT, any disbursement, and escalations, if applicable, etc. for the entire duration of the proposed contract must be provided. |
| 4 | A Valid B-BBEE Certificate or Sworn Affidavit to determine the Service provider's status level. |
| 5 | SBD 4 – Bidders Disclosure. |
| 6 | Sb 6.1 Preference Points Claim Form in Terms of The Preferential Procurement Regulations 2022 |

5. Functionality Scoring

The Minimum qualifying score for functionality to advance is 70 out of 100.

All bidders achieving less than the minimum qualifying score will be declared non-responsive and will not qualify to be evaluated on Price and specific goals

| Functionality Criteria (70 points) | | | Point Allocation |
|---|--|--|------------------|
| 1. | Company Experience: Service provider should at least have 3-5 years' experience in developing high impact integrated marketing and communications strategy including: public relations, media engagement, campaign development, production and evaluation. (Proof should be in the form of a Company Profile, company awards and or achievements/ reference letter/s and past client summaries, including name of the client and contact Details) | | |
| | Does not meet requirement Less than 1-2 years' experience | Meets the requirement 3-5 years' experience | |
| | 10 | 20 | |
| 2. | Company Expertise: Service provider should have expertise and available resources. (Proof should be Company Profile, company service offering and examples and or portfolio highlighting expertise in various components.) | | |
| | Does not meet requirement Either only digital or Focused on specific area | Meets the requirement Traditional, Digital, Creative, Production | |
| | 10 | 20 | |
| 3 | Project Approach Methodology: Bidders are required to outline intended process of development and implementation, indicating how their organisational resources will be allocated. | | |
| | Does not meet requirement Project approach methodology has limitations and contingencies are not outlines. | Meets the requirement Project approach methodology demonstrates capacity, resources and time to implement within timeframes. Contingencies outlined. | |
| | 10 | 20 | |
| 4 | Budget allocation: The bidder must indicate how the R450thousand for the project implementation will be used across the main areas of deliverables. | | |
| | Does not meet requirement Budget summary for each activation is impractical. | Meets the requirement Budget summary and explanation is realistic and supports event concept proposal. | |
| | 0 | 5 | |
| Total points | | | 100 |
| Minimum Stipulated Threshold to be met | | | 70 |

6. Costing Breakdown

Price is an important factor as it ensures optimum value for money and should consider all potential aspects of the hosting, development, maintenance and optimisation process and implementation. A cost schedule detailing, inclusive of VAT, all applicable elements, detailing the following contract components must be provided as indicated below:

Table: Cost Schedule Summary

| Service | Amount |
|----------------------------------|--------|
| Processing/management fee | |
| Public Relations | |
| Media Engagement | |
| Campaign development | |
| Contingencies | |
| Sub Total (Excluding VAT) | |
| VAT 15% | |
| Total including VAT | |

7. Evaluation Criteria

Proposals will be evaluated on the 80/20 preference points scoring system: that is, 80% of the points awarded will be based on price, as indicated in the table below; and 20% of the points awarded will be based on specific goals, allocated as indicated in the table below:

| Description | Specific goals allocated points: Black persons (ownership)* | Price |
|----------------------|---|-------|
| Total maximum points | 20 | 80 |

Note: Failure to supply any of the compliance documents stipulated may lead to the quote not being considered.

8. Formal Contract

- The proposal and appended documentation read together form the basis for an agreement to be negotiated and concluded in a formal contract between Iziko and the preferred Service Provider.
- A mere offer and acceptance shall not constitute a formal contract of any nature for any purpose between Iziko and the preferred Service Provider/s.

9. General Principles

- The lowest or only quotation received will not necessarily be accepted.
- Iziko and its Council reserves the right to accept or reject any quotation in response to the Request to Quote and to withdraw its decision to seek the provision of these services at any time.

10. DECLARATION

The undersigned, who warrants that he / she is duly authorized to do so on behalf of the enterprise:

- i) confirms that neither the name of the enterprise or the name of any partner, manager, director or other person, who wholly or partly exercises, or may exercise, control over the enterprise appears on the Register of Tender Defaulters established in terms of the Prevention and Combating of Corrupt Activities Act of 2004;
- ii) confirms that no partner, member, director or other person, who wholly or partly exercises, or may exercise, control over the enterprise appears, has within the last five years been convicted of fraud or corruption;
- iii) confirms that I / we are not associated, linked or involved with any other tendering entities submitting tender offers and have no other relationship with any of the tenderers or those responsible for compiling the scope of work that could cause or be interpreted as a conflict of interest; and;
- iv) confirms that the contents of this questionnaire/forms (SBD 4, & 6.1) are within my personal knowledge and are to the best of my belief both true and correct
- v) accept that, in addition to cancellation of a contract, action may be taken against me should the Declaration prove to be false.
- vi) In terms of Preferential Procurement Regulation 11 and section 2(1) (f) of the Preferential Procurement Policy Framework Act, Iziko Museums may consider the following objective criteria in the bid award:
 - vii) The risk of fruitless and wasteful expenditure to Iziko Museums.
 - viii) The risk of an abnormally low bid.
 - ix) The risk of a material irregularity.
 - x) Iziko Museums reserves the right not to consider bids from Bidders who are currently in litigation with Iziko; and
 - xi) Iziko Museums further reserves the right not to award this tender to any Bidder based on the proven poor record of accomplishment of the Bidder in previous projects within Iziko Museums and the referee submitted by the Bidder.

Signed

Date

Name

Position

Enterprise name

Please note that if the supporting documentation is not provided then the submission will be classified as non-responsive.

1. Disqualification

Please note that if a bid document is not filled in correctly or completely, or complied with the specification, or is delivered/sent after the bid closing date and time, or the supplier is not registered on the CSD or supplier has a non-compliant tax status, then unfortunately that bidder maybe disqualified. Please return this document with the supporting documents.

2. Bid Document Submission

Emailed tender documents will be accepted. However, the onus is on the tenderer to ensure that complete email documents have been received by Iziko Museums by the due date and time. Please note that any alterations to the tender document other than filling in the tenderer's details and tender price will automatically disqualify the tenderer.