

REQUEST FOR QUOTATION

YOU ARE HEREBY INVITED TO QUOTE FOR REQUIREMENTS OF THE MARINE LIVING RESOURCES FUND

REQUEST FOR QUOTATIONS: RFQ000755 DATE: 06 NOVEMBER 2023 CLOSING TIME: 00:00

DESCRIPTION:

TO APPOINT A SERVICE PROVIDER (SP) TO ASSIST THE DFFE / MLRF TO CONDUCT SOCI-ECONOMIC STUDY ON HAKE HANDLINE, OYSTERS, AND WHITE MUSSELS FOR A PERIOD OF 12 MONTHS.

NB: Suppliers should be registered on the CSD

The successful bidder will be required to fill in and sign a written Contract Form (SBD 7).

RFQ DOCUMENTS MAY BE EMAILED TO:

NFono@dffe.gov.za

Bidders should ensure that bids are delivered timeously to the correct address. If the bid is late, it will not be accepted for consideration.

ALL RFQ'S MUST BE SUBMITTED ON THE OFFICIAL FORMS

THIS RFQ IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT

THE FOLLOWING PARTICULARS MUST BE FURNISHED
(FAILURE TO DO SO MAY RESULT IN YOUR BID BEING DISQUALIFIED)

NAME OF BIDDER	.....
POSTAL ADDRESS	.....
STREET ADDRESS	.....
TELEPHONE NUMBER	CODE.....NUMBER.....
CELLPHONE NUMBER	.....
FACSIMILE NUMBER	CODE .....NUMBER.....
E-MAIL ADDRESS	.....
VAT REGISTRATION NUMBER	.....
HAS AN ORIGINAL AND VALID TAX CLEARANCE CERTIFICATE BEEN SUBMITTED? (SBD 2)	YES or NO

HAS A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE BEEN SUBMITTED? (SBD 6.1)

YES or NO

IF YES, WHO WAS THE CERTIFICATE ISSUED BY?

AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA).....

A VERIFICATION AGENCY ACCREDITED BY THE SOUTH AFRICAN ACCREDITATION SYSTEM (SANAS);
OR.....
A REGISTERED AUDITOR
[TICK APPLICABLE BOX]

ARE YOU THE ACCREDITED REPRESENTATIVE
IN SOUTH AFRICA FOR THE GOODS / SERVICES / WORKS OFFERED?
NO

YES or

[IF YES ENCLOSE PROOF]

SIGNATURE OF BIDDER

DATE

CAPACITY UNDER WHICH THIS BID IS SIGNED

TOTAL BID PRICE..... TOTAL NUMBER OF ITEMS OFFERED

ANY ENQUIRIES REGARDING THIS RFQ PROCEDURE MAY BE DIRECTED TO:

Contact person: Nomlibo Fono
Tel: (021) 402 3055
Email address: NFono@dfre.gov.za

ANY ENQUIRIES REGARDING TECHNICAL INFORMATION MAY BE DIRECTED TO:

Contact person: Dyondzo Machimana
Tel: 021 402 3235
Email address: Dmachimane@dfre.gov.za

PRICING SCHEDULE
(Professional Services)

NAME OF BIDDER:	RFQ NO.: RFQ 000755
CLOSING TIME 00:00	CLOSING DATE: 02 November 2023

OFFER TO BE VALID FOR 60 DAYS FROM THE CLOSING DATE OF BID.

ITEM NO 01	DESCRIPTION	BID PRICE IN RSA CURRENCY **(ALL APPLICABLE TAXES INCLUDED)
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TO APPOINT A SERVICE PROVIDER (SP) TO ASSIST THE DFFE / MLFR TO CONDUCT SOCI-ECONOMIC STUDY ON HAKE HANDLINE, OYSTERS, AND WHITE MUSSELS FOR A PERIOD OF 12 MONTHS.

NB: Suppliers should be registered on the CSD

1. The accompanying information must be used for the formulation of proposals.
2. Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project. R.....

3. PERSONS WHO WILL BE INVOLVED IN THE PROJECT AND RATES APPLICABLE (CERTIFIED INVOICES MUST BE RENDERED IN TERMS HEREOF)

4. PERSON AND POSITION	HOURLY RATE	DAILY RATE
.....	R.....	.....
.....	R.....	.....
.....	R.....	.....
.....	R.....	.....
.....	R.....	.....

5. PHASES ACCORDING TO WHICH THE PROJECT WILL BE COMPLETED, COST PER PHASE AND MAN-DAYS TO BE SPENT

.....	R.....	..... days
.....	R.....	..... days
.....	R.....	..... days
.....	R.....	..... days

- 5.1 Travel expenses (specify, for example rate/km and total km, class of airtravel, etc). Only actual costs are recoverable. Proof of the expenses incurred must accompany certified invoices.

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT
.....	R.....
.....	R.....
.....	R.....
.....	R.....

Bid No.:

Name of Bidder:

TOTAL: R.....

** "all applicable taxes" includes value- added tax, pay as you earn, income tax, unemployment insurance contributions and skills development levies.

- 5.2 Other expenses, for example accommodation (specify, eg. Three star hotel, bed and breakfast, telephone cost, reproduction cost, etc.). On basis of these particulars, certified invoices will be checked for correctness. Proof of the expenses must accompany invoices.

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT
.....	R.....
.....	R.....
.....	R.....
.....	R.....

TOTAL: R.....

6. Period required for commencement with project after acceptance of bid
 7. Estimated man-days for completion of project
 8. Are the rates quoted firm for the full period of contract? *YES/NO
 9. If not firm for the full period, provide details of the basis on which adjustments will be applied for, for example consumer price index.

*[DELETE IF NOT APPLICABLE]

Any enquiries regarding bidding procedures may be directed to the –

DEPARTMENT OF FORESTRY, FISHERIES & THE ENVIRONMENT

ATTENTION Mrs. Nomlibo Fono-Ncedo

Tel: 021 402 3055

Or for technical information –

ATTENTION: Dyondzo Machimana

TEL: 021 402 3235



forestry, fisheries & the environment

Department:
Forestry, Fisheries and the Environment
REPUBLIC OF SOUTH AFRICA

MARINE LIVING RESOURCES FUND

REQUEST FOR PRICE QUOTATIONS

The Marine Living Resources Fund (MLRF) is a Schedule 3A entity within the Department of Forestry, Fisheries and the Environment. The MLRF hereby request your quotation on the goods/service/works listed hereunder.

RFQ Number	OCD: MRM/209/002/2023/24
Description	TO APPOINT A SERVICE PROVIDER (SP) TO ASSIST THE DEPARTMENT OF FORESTRY, FISHERIES AND THE ENVIRONMENT (DFFE) / MARINE LIVING RESOURCES FUND (MLRF) TO CONDUCT SOCIO-ECONOMIC STUDY ON HAKE HANDLINE, OYSTERS AND WHITE MUSSELS FOR A PERIOD OF 12 MONTHS.
Detailed Specification/scope of work and functionality	Attached as Annexure A
Local Production & Content Requirements (attached please find the relevant Circular from NT)	
Briefing Session	01 NOVEMBER 2023
RFQ Publication date	23 OCTOBER 2023
Responses MUST be submitted to	FOR NOMLIBO FOND
RFQ Closing Details	06 NOVEMBER 2023
Delivery Address	For the attention of: Foretrust building, Martin Hammerschlag Way, Foreshore, Cape Town, 8001
Quotation Validity Period	60 Days from the Closing Date

Initials:

D.D

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Mandatory Requirement/Pre-Qualification Criteria	See Attached Terms of Reference.
Evaluation Criteria	See Annexure A.
NO HAND DELIVERED RFQ RESPONSES WILL BE ACCEPTED PROSPECTIVE BIDDERS MUST BE REGISTERED ON NATIONAL TREASURY'S CENTRAL SUPPLIER DATABASE (CSD) PRIOR TO SUBMITTING BIDS AND THEIR TAX MATTERS MUST BE IN ORDER	

TERMS AND CONDITIONS OF REQUEST FOR QUOTATION (RFQ)

1. Terms and conditions of Request for Quotation (RFQ)

- 1.1 This document may contain confidential information that is the property of the Marine Living Resources Fund [MLRF].
- 1.2 No part of the contents may be used, copied, disclosed, or conveyed in whole or in part to any party in any manner whatsoever other than for preparing a proposal in response to this RFQ without prior written permission from MLRF.
- 1.3 All copyright and intellectual property herein vests with MLRF.
- 1.4 Late and incomplete submissions will not be considered. Submissions received after closing time and date will be classified as LATE and WILL NOT be considered.
- 1.5 No services must be rendered, or goods delivered before an official MLRF Purchase Order form has been issued by a duly authorised official from the MLRF and received by the bidder. Please note that this is not an instruction to proceed with supply of any goods or service unless the quotation is approved, and a Purchase Order is supplied to you.
- 1.6 Please note that if you receive the Purchase Order, delivery of goods or rendering of services must be done within 14 calendar days or upon agreed time frames. Failing to deliver upon agreed times will result in your Purchase Order being cancelled.
- 1.7 This RFQ will be evaluated in terms of the 80/20 preference point system if is equal to or below R50 million.
- 1.8 Bidders are required to register on the Central Supplier Database at www.csd.gov.za if you are not registered on the CSD.
- 1.9 All questions regarding this RFQ must be forwarded within 24 hours after the RFQ has been issued.
- 1.10 Any bidder who has reasons to believe that the RFQ specification is based on a specific brand must inform MLRF within two (2) days before the RFQ closing date.
- 1.11 Where quotations/proposals submitted are equal to or below R50 million, bidders are required to submit the original and valid proof for preference points claimed or certified copies thereof; to substantiate their preference points claims. SBD 6.1 must also be duly completed, signed, and submitted alongside the bid to claim preference points. Failure to do so will result in preference points being forfeited.

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- 1.12 As per section 4(1) of the Preferential Procurement Regulations of 2022, the maximum 20 points may be awarded based on specific goals. The 20 points will be allocated as follows:

SPECIFIC GOAL	POINTS TO BE ALLOCATED
51% black owned	8 points
50% women	4 points
Youth	4 points
Disability	4 points
TOTAL POINTS	20 points

- 1.13 Bidders are required to duly complete, sign and submit the new SBD 4 together with their quotations/proposals. Failure to do so may result in your quotation/proposal **not** being accepted.
- 1.14 For designated sectors for local production and content, SBD 6.2 and Annexures C, D & E must be duly completed, signed and SBD 6.2 together with Annex E must be submitted with your quotation/proposal.
- 1.15 All quotations/proposals submitted must be inclusive of Value Added Tax (VAT) if you are VAT registered and must be quoted in South African Rands (ZAR) and price must be firm.
- 1.16 The full costs must be disclosed as there will be no variances that will be entertained, and no price adjustment will be entertained after the Purchase Order has been issued.
- 1.17 These terms and conditions supersede any terms and conditions that may be issued by the service provider/supplier on their quotations or any other document similar to that.
- 1.18 Full and updated CSD report must be submitted with the quotation and MLRF will only contract with supplier's/service providers that their tax matters are in order.
- 1.19 The MLRF pays within 30 (thirty) days after receipt of a valid tax invoice and after approval of relevant invoice and reports and does not make upfront payments or deposits.
- 1.20 It is the responsibility of prospective bidders to ensure that all bid documents are submitted before the closing date and time of the RFQ.

2. PROTECTION OF PERSONAL INFORMATION

In responding to this RFQ, MLRF acknowledges that it may obtain and have access to personal data of the respondents. MLRF agrees that it shall only process the information disclosed by bidders in their response to this RFQ for the purpose of evaluating and subsequent award of business and in accordance with any applicable law. Furthermore, MLRF will not otherwise modify, amend, or alter any personal data submitted by Respondents or disclose or permit the disclosure of any personal data to any Third Party without the prior written consent from the Respondents. Similarly,

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MLRF requires Respondents to process any process any personal information disclosed by MLRF in the bidding process in the same manner.

MLRF RESERVES THE RIGHT NOT TO MAKE ANY APPOINTMENT AND SHALL NOT ENTERTAIN ANY CLAIM FOR COSTS THAT MAY HAVE BEEN INCURRED IN THE PREPARATION AND THE SUBMISSION OF THIS QUOTATION/PROPOSAL

Approvals of RFQ

End User	<i>Requester</i>	Dyondzo Machimana	<i>Rank</i>	SAC	<i>Cost Centre Manager</i>	Saasa Pheeha	<i>Rank</i>	Chief Director
	<i>Signature</i>		<i>Date</i>	17/09/2023	<i>Signature</i>		<i>Date</i>	17/09/2023
It is hereby certified that all the information supplied in this form is correct, that the requirement may be procured and that funds are available.								
SCM Only								
Official verifier (buyer)	<i>Name</i>	N Fono	<i>Signature</i>		<i>Date</i>	18/10/2023		
Approver as per Delegations	<i>Name</i>	M Makhetha	<i>Signature</i>		<i>Date</i>	18/10/2023		



forestry, fisheries & the environment

Department:
Forestry, Fisheries and the Environment
REPUBLIC OF SOUTH AFRICA

THE MARINE LIVING RESOURCES FUND, A SCHEDULE 3A PUBLIC ENTITY ESTABLISHED IN TERMS OF THE PUBLIC FINANCE MANAGEMENT ACT, 1999 (ACT NO 1 of 1999) AND THE DEPARTMENT OF FORESTRY, FISHERIES AND ENVIRONMENT ("DFFE") (IN ITS COMMITMENT TO THE PRINCIPLES ENSHRINED IN THE CONSTITUTION OF THE REPUBLIC OF SOUTH AFRICA, 1996) ADHERES TO THE PROVISIONS OF THE BROAD BASED BLACK ECONOMIC EMPOWERMENT ACT, 53 OF 2003 (B-BBEE), THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 5 OF 2000 ("PPPF") AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022.

TERMS OF REFERENCE

TO APPOINT A SERVICE PROVIDER (SP) TO ASSIST THE DEPARTMENT OF FORESTRY, FISHERIES AND THE ENVIRONMENT (DFFE) / MARINE LIVING RESOURCES FUND (MLRF) TO CONDUCT SOCIO-ECONOMIC STUDY ON HAKE HANDLINE, OYSTERS, AND WHITE MUSSELS FOR A PERIOD OF 12 MONTHS.

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1. PURPOSE

To appoint a service provider (SP) to assist the Department of Forestry, Fisheries and the Environment (DFFE) / Marine Living Resources Fund (MLRF) to

- 1.1 To conduct a socio-economic study on the hake handline, oysters, and white mussel local commercial fishing sectors in order to assist the Department in better understand the factors affecting the long-term sustainability of fish stocks. The study will help the Department in making informed decisions in the granting of right of access and to fairly and equitably allocate fishing rights. The information collected will be important to the Department in providing insights into the ever-changing economic conditions, market dynamics, and resource availability that continuously require understanding and sensitivity to the potential costs and benefits of various management options. This study should contribute to the holistic approach that will aid in developing policies that balance economic interests with ecological concerns.
- 1.2 The study shall include but not limited to:
 - 1.2.1 Evaluate the economic performance of the hake handline, oysters, and white mussel commercial fishing sectors, including revenue, profitability, and contribution to the local and national economy.
 - 1.2.2 Examine the social implications of the hake handline, oysters, and white mussel commercial fishing sectors, including their role in providing employment, income distribution, and community well-being, particularly among small-scale fishers.
 - 1.2.3 Map out the entire value chains for the hake handline, oysters, and white mussel commercial fishing sectors, from harvesting and processing to distribution and consumption, highlighting key stakeholders and interactions.
 - 1.2.4 Analyse market trends, including demand, prices, market access, competition, and international trade, to understand the market forces affecting the hake handline, oysters, and white mussel commercial fishing sectors.
 - 1.2.5 Identify and assess the risks and vulnerabilities faced by the hake handline, oysters, and white mussel commercial fishing sectors, including economic, social, and environmental risks, and propose strategies for risk mitigation and adaptation.
 - 1.2.6 Investigate the cultural and traditional aspects of fishing communities involved in the hake handline, oysters, and white mussel commercial fishing sectors and how these aspects relate to their livelihoods and well-being.
- 1.3 Based on research findings, provide policy recommendations that support the sustainable and equitable development of the hake handline, oysters, and white mussel sectors, considering the interests of all stakeholders.

1.4 **Table 1: Indicators for socio-economic impacts**

Impact Area	Indicators
1. Economic conditions	Economic structure
	Income levels
	Job opportunities
2. Community structure, institution, and infrastructure	Health and social services in study area, including health, workforce, law enforcement, fire protection, water supply, wastewater treatment facilities, solid waste collection and disposal, and utilities.
	Transportation systems in study area, including highway, rail, air, and motorway.
	Tourism and recreational opportunities in the study site.
	Tax levels and patterns in the study area, including land, sales, and income taxes.
	Institutional structure.
	Community cohesion, including organized community groups.
	Social orders including community attitudes, lifestyle and history of the community.
	Distinct settlements of ethnic groups.
3. Demographic conditions	General trends in population size for study site.
	Migration trends in the study area.
	Population characteristics in the study area including distribution by age, gender, ethnic groups, educational level and family size.
	poverty and wealth distribution.
4. Employment	Employment composition.
	Unemployment rate.
	Availability of job opportunities and their nature.
5. Gender	Gender distribution.
	Employment structure.
	Role of women.
6. Community resources	Land use patterns and controls for study site.

	Land values in the study area.
	Housing characteristics in the study area, including types of housing and occupancy levels and age and condition of housing.
	Areas of unique significance.
7. Any Other	

2. INTRODUCTION AND BACKGROUND

- 2.1. Section 14(2) of the Marine Living Resources Act, 1998 (Act No, 18 of 1998) as amended (the MLRA) provides that: "The Minister shall determine the portions of the total allowable catch, the total applied effort, or a combination thereof, to be allocated in any year to small-scale, recreational, local commercial and foreign fishing, respectively." The powers conferred upon to Minister in terms the MLRA to execute section 14(2) of the MLRA has been delegated to the Deputy Director-General: Fisheries Management ("DDG: FM") in terms of section 79(1)(a) of the MLRA.
- 2.2. Section 18 of the MLRA provides that: "No person shall undertake commercial fishing or small-scale fishing, engage in mariculture or operate a fish processing establishment unless a right to undertake or engage in such activity or operate such an establishment has been granted to such a person by the Minister."
- 2.3. During 2005/2006 Long Term Rights Allocation and Management Process (LTRAMP) Commercial Fishing Rights were allocated in terms of section 18 (2) of the MLRA in all other commercial fishing sectors excluding Fish Processing Establishment for a period ranging from 7, 10 and 15 years.
- 2.4. In 2007, the Equality Court made a judgment and instructed the Department to develop a Small-Scale Fisheries Policy for the small-scale fishers of South Africa, after individuals and organisations claiming to represent subsistence fishers, who lodged simultaneous applications in the high court and in the equality court at Cape Town, claiming that the Minister had failed to provide them with just access to fishing rights, and seeking an order giving them equitable access to marine resources.
- 2.5. In response to the Equality Court judgement, the Department implemented an Interim Relief (IR) system for the excluded traditional fishers. The IR system was basically a basket of fishing resources given to different fishing communities, which consisted mostly of crayfish and Linefish, depending on what is available around that community.
- 2.6. On 20 June 2012, the Department developed and published a Policy for Small-Scale Fisheries Sector in South Africa ("the Small-Scale Policy") which provide the framework for promotion of the rights of the previously marginalised and discriminated Small-Scale fisher communities.
- 2.7. In 2013 commercial fishing rights were allocated for seven years in terms of section 18(2) of the MLRA for the rights that were allocated for 7 years during Long Term Rights Allocation and Management Process (LTRAMP) 2005/2006 which expired in December 2013.

- 2.8. The Small-Scale Policy Implementation Plan was finalised in 2013 and the MLRA was amended in 2014 to accommodate the Small-Scale Fisheries Sector. The regulations were approved in March 2016, which allowed the Department to proceed with the Small-Scale implementation process.
- 2.9. Paragraph 6.2.3 of The Small-Scale Policy provides for allocation of multi-species approach within an area. The decision to allocate which species will be including in the allocation, and the quantum of the allocation, will be based on the quantity of the marine resources available given the TAC, zonal allocations, and TAE of particular species.
- 2.10. Section 14 of the Marine Living Resources Act, 1998 (Act No. 18 of 1998) as amended ("the MLRA") provides for the apportionment of Total Allowable Catch ("TAC"), Total Applied Effort ("TAE") or combination thereof to be allocated to Small-Scale, Recreational, Local Commercial, and Foreign fishing, respectively.
- 2.11. During FRAP2015/16 commercial fishing rights were allocated for 15 years in terms of section 18(2) of the MLRA for the rights that were allocated during LTRAMP 2005/2006 for a period of 10 years, including the Fish Processing Establishment's. The Department also invited applications for allocation of fishing rights in the Abalone fishing sector, but the Delegated Authority decided not to allocate rights in the Abalone sector.
- 2.12. Government Gazette No.43834 dated 23 October 2020 states that White Mussels, Oysters, and Hake Handline fishing sectors have been identified as eligible for Small-Scale Fisheries and therefore the reclassification of the White Mussels, Oysters, and Hake Handline fishing sectors as Small-Scale Fishing sectors was proposed.
- 2.13. Gazettes calling for comments on White Mussel, Oysters, and Hake Handline to be classified as small -scale fishing species and on determination of 50/50 percent portions of the total allowable catch, to be allocated in any year to small-scale and local commercial fishing sectors. However only few comments were received by the Department, and as a result the Department has taken a decision to further consult with the affected parties.
- 2.14. During FRAP2020/21, the Department allocated commercial fishing rights on several fishing sectors whose rights have expired in December 2020. Therefore, no commercial fishing rights were allocated in the White Mussel, Oyster, and Hake Handline fishing sectors during the 2020/2021 Fishing Rights Allocation Process. This was due to a pending decision to be made by the Department on the reclassification of White Mussel, Oyster, and Hake Handline fishing sectors as Small-Scale fishing species. In other words, this was due to amongst others the pending decision on determining zero portions of the total allowable catch, total applied effort, or a combination thereof, to be allocated in any year to hake handline, oysters, and white mussel local commercial fishing sectors.

3. VIRTUAL COMPULSORY BRIEFING SESSION

- 3.1. To ensure that service providers understand what is required from them with regards to this tender, Service providers must attendance of a compulsory briefing session. The sessions will take place as follows:
 - 01 November 2023 at 12h30 to 14h30

The link for the sessions can be requested via email:

Name	Email address
Ms. Nomlibo Fono	NFono@dfpe.gov.za

4. SCOPE AND EXTENT OF WORK

- 4.1. The service provider is required to ensure that the socioeconomic study is organized and conducted properly, it should be systematic, and have minimum bias, and allow for consistent comparison and reasoned judgment by developing a carefully planned, very precise and logical work methodologies.
- 4.2. The service provider is also required to develop a workplan for the socio-economic study once the work methodologies are developed. The workplan shall include but not limited to:
 - 4.2.1. Baseline conditions,
 - 4.2.2. Field work,
 - 4.2.3. Data analysis and socioeconomic assessment,
 - 4.2.4. A conceptual framework for sustainable development.
- 4.3. The service provider is required to submit a detailed project charter on how to achieve the scope of the work. The project plan must provide details about the milestones and costing.
- 4.4. Develop a communication plan, and draft newspaper articles as well as Government Gazette notices to ensure proper and effective communication on an ongoing basis to all stakeholders in the Hake Handline, Oyster, and White Mussels fishing sectors to ensure compliance with the relevant provisions of the Promotion of Administrative Justice Act (Act 3 of 2000).
- 4.5. Ensure that public consultation process with all Hake handline, Oyster and White Mussel exemption holders is widely communicated, and adverts are in the mainstream newspaper in a particular region.
- 4.6. Conduct stakeholder consultation and develop a status quo report in terms of the scope of work, and submit consolidated stakeholder engagement report for, including comments and responses.
- 4.7. Submit consolidated stakeholder engagement report, including comments and responses.
- 4.8. Submit a draft evaluation report to the MLRF.
- 4.9. MLRF reserves the right to provide reporting template.
- 4.10. The study should include a critical evaluation of the resources. The purpose of the evaluation is to assess to what extent the current configuration of resources can be used to support the further development of the fishing industry.
- 4.11. The study should include the formulation of possible outline strategies for the development of those resources to support Small-scale fishing co-operatives.
- 4.12. Collect and collate the information on the socioeconomic status of the fishermen involved in those fishing sectors i.e., Hake Handline, Oyster, and White Mussels.

- 4.13. The impact of fisheries development policies and programmes on the income, and nutrition of individuals and groups at risk; in this context the service provider should show awareness of the differential impact of programmes on policies on different genders, and other social and cultural categories.
- 4.14. The study shall include recommendations that support the sustainable and equitable development of the hake handline, oysters, and white mussel sectors, considering the interests of all stakeholders.
- 4.15. The study should comment upon the unintended consequences of incorporating Hake Handline, Oysters, and White Mussels exemption Holders into the existing small-scale co-operatives with particular focus but not limited on income distribution and other socio-economic variables.

5. PERIOD / DURATION OF APPOINTMENT

- 5.1. The contract with the appointed SP will run for a period of twelve (12) months and will commence as agreed in the Memorandum of Agreement (MOA), signed between the MLRF and the SP and when a purchase order has been issued to the SP.

6. COSTING / COMPREHENSIVE BUDGET

- 6.1. A comprehensive costing must be provided in a separate envelope inclusive of all disbursement costs and related expenditure inclusive of Value Added Tax (VAT). Refer to additional pricing schedule for further detail and SBD 3.3 and ANNEXURE B1 to be completed. The Service Provider (SP) must quote for all activities and should be quoted in South African currency.
- 6.2. The MLRF shall not pay for any unproductive or duplicated time spent by the SP on any assignment because of staff changes, outsourcing, or re-drafting of reports due to errors, corrections, or incorrect/incomplete findings.
- 6.3. The MLRF reserves the right to negotiate with one or more preferred Service provider(s) identified in the evaluation process, regarding any terms and conditions, including prices without offering the same opportunity to any other Service provider(s) who have not been awarded the status of the preferred Service provider(s).
- 6.4. Travelling costs and time spent or incurred between home and office of the service provider and MLRF office will not be for the account of MLRF. Travelling costs and time spent or incurred between the office of the service provider and consultation centres will be for the account of MLRF. The service provider is expected to adhere to subsistence and travelling allowance: domestic rates as prescribed by MLRF.

7. EVALUATION METHOD

- 7.1. The evaluation for this bid will be carried out in three (3) phases:
- Phase 1: Pre-compliance
 - Phase 2: Mandatory Requirement

- Phase 3: Price and Specific Goals

7.2. PHASE 1: PRE-COMPLIANCE OR INITIAL SCREENING

- 8.2.1. During this phase bid documents will be reviewed to determine the compliance with Supply Chain Management Standard Bidding Documents and any other required returnable, tax matters and whether the Central Data Base (CSD) report has been submitted with the bid documents at the closing date and time of the bid. Bids which do not satisfy the compliance criteria will not be evaluated further.
- 8.2.2. The bid proposal will be screened for compliance with administrative requirements as indicated below:

Item No.	Administrative Requirements	Check/Compliance	Non-submission may result in disqualification?
1	SCM - SBD 1 - Invitation to Bid	Completed and signed	*NO
2	SCM - SBD 2 - Tax Clearance Certificate Requirements	CSD registration number/SARS PIN and CSD summary report	**NO
3	SCM - SBD 3.3 – Pricing Schedule	Completed and signed	*NO
4	SCM – NEW SBD 4 - Declaration of Interest	Completed and signed	*NO
5	SCM - NEW SBD 6.1 - Preference Points Claim Form in terms of the Preferential Procurement Regulations 2022	Completed and signed.	**NO
6	In case of bids where Consortia / Joint Ventures, Consortia agreement signed by both parties must be submitted with bid proposal	JV agreement completed and signed, if applicable	*No

***NO** – MLRF reserves the right to send a request for information (RFI) to the service provider in the event of non-submission or incomplete documentation and to request a response within seven (7) days after the date of sending the RFI. If the documents are not submitted or completed in full within seven (7) days, the MLRF will reject proposals, and these will not be further evaluated for phase 2.

8.3. PHASE 2: MANDATORY REQUIREMENTS

- 8.3.1. The following table must be completed by the Service provider by answering YES OR NO and attach proof.

8.3.2. Only Service providers who achieve a “Yes” for all mandatory requirements will proceed for evaluation to phase 3.

REQUIREMENT	REQUIRED PROOF TO BE SUBMITTED WITH BID	COMPLY: YES OR NO
The Project leader(s) is registered with the Economic Society of South Africa (ESSA) and South African Sociological Association (SASA) as a professional or relevant field of practise covering the scope of work outlined in SECTION 4 above.	ESSA and SASA registration number, certificate / annual subscription	
The Service provider has conducted at least two or more of the socio-economic studies or any relevant study associated with the scope of work.	Company Profile	
Service provider's verifiable experience in conducting socio-economic study and/or any related study.	At least 3 signed reference letters from contactable clients on successfully completed work on conducting the socio-economic studies.	
The Project Team key members have demonstrable minimum of 2 years' experience in conducting socio-economic studies projects and required to draft the reports listed above or be supported by a team with the required skills.	CV of Project team key members	
The Project leader has at least an MSc in Resource Economics and Sociology.	MSc Degree	
The team must consist of Resource Economists and Sociologists	At least Degree	

** The information in the CV of the proposed Team Leader and Team Key Members should include relevant experience and qualifications in the chosen area of expertise demonstrating the required competency.*

8.4. PHASE 3: Calculating of points for Specific Goals

- 8.4.1. Points will be awarded to a supplier for specific goals. Service providers are required to submit the original and valid proof for preference points claimed or certified copies thereof; to substantiate their preference points claims. SBD 6.1 must also be duly completed, signed, and submitted alongside the bid to claim preference points. Failure to do so will result in Specific Goals preference points being forfeited.
- 8.4.2. The 80/20 as an appropriate preference point system will be used in the evaluation and adjudication of this quotation. However, it must be extended that the lowest acceptable supplier will be used to determine the applicable preference point system as per regulation (Section 3(2)(b) of the Preferential Procurement Regulations (PPR) 2022, which states: “If it is unclear which preference point system will be applicable, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable supplier will be used to determine the applicable preference point system”. Therefore, either 80 or 90 points,

depending on the rand value of the quotation, will be awarded to the suppliers who offers the lowest price, and proportionately fewer points are awarded to those with higher prices. Either 20 or 10 points are then available as preference points for specific goals, as applicable. The contract will be awarded to the suppliers that scores the highest total number of adjudication points per category.

8.4.3. Points will be awarded to a supplier for specific goals in accordance with the table below:

A.	PRICE	80
B.	Specific Goal	Number of points (20)
	51% black ownership	8
	50% women ownership	4
	Youth ownership	4
	Disability	4
	Non-compliant contributor	0

*The definitions of the above specific goals are as per the PPR policy of the MLRF.

- 8.4.4. The SCM unit of the DMLRF will allocate preferential points (Specific Goals) to each company for its contribution towards empowerment of the black designated groups as prescribed in the Preferential Procurement Regulations of 2022, women, people with disabilities, youth as well as local economic development.
- 8.4.5. A supplier will not be disqualified from the quotation process if the suppliers does not submit supporting documents substantiating the specific goals preference points claimed or is a non-compliant contributor. Such some suppliers will score 0 for Specific Goals.
- 8.4.6. Suppliers will be subject to SCM conditions of the Department – MLRF and the Preferential Procurement Regulations, 2022 issued in terms of section 5 of the Preferential Procurement Policy Framework Act (Act No 5 of 2000) (PPPFA).
- 8.4.7. The PPPFA prescribes that the lowest acceptable bid will score 80 or 90 points for price (as explained above, depending on whether the bid prices is more or less than R50million). Suppliers that quoted higher prices will score lower points for price on a pro-rata basis. Where functionality is set as a criterion, only bid proposals that meet functionality requirements will be considered to be evaluated on price and Specific Goals.
- 8.4.8. The contract will be awarded to the supplier scoring the highest points subject to section 2(1) (f) of the PPPFA, 2000.

9. SPECIAL CONDITIONS OF CONTRACT

- 9.2. On appointment, the performance measures for the delivery of the agreed services will be closely monitored by MLRF.
- 9.3. The MLRF will not be held responsible for any costs incurred by the SPs in the preparation, presentation and submission of the proposal.
- 9.4. The appointed Contract Manager shall do the ongoing management of the Memorandum of Agreement (MOA).
- 9.5. All the conditions specified in the General Conditions of Contract (GCC) will apply and where the conditions in the special conditions of contract contradicts the conditions in the general conditions of contract, the special conditions of contract will prevail.
- 9.6. The bid proposals should be submitted with all required information containing technical information.
- 9.7. Travelling costs and time spent or incurred between home and office of the SP and the MLRF office will not be for the account of Department / MLRF.
- 9.8. Service providers failing to meet all the requirements will automatically be disqualified.
- 9.9. Poor or non-performance by the Service provider will result in cancellation of the order and the MOA.
- 9.10. Should the service provider fail to perform, the Department /MLRF reserves the right to cancel the appointment of such service provider immediately and without any notice. The Department / MLRF also reserves the right to recover the costs incurred in arranging such training e.g. salaries/wages of attendees and any other costs deemed necessary for the successful execution of the training.

10. PAYMENT TERMS

- 10.2. The MLRF undertakes to pay out in full or as per deliverables within 30 (thirty) days all valid claims for work done to its satisfaction upon presentation of a substantiated claim and the required reports stipulated in special conditions. No payment will be made where there is outstanding information/work not submitted by the Service Provider/s until that outstanding information is submitted.
- 10.3. Payment by the MLRF shall be made by means of an electronic transfer into the SP's bank account.
- 10.4. Payment requirements
 - The successful Service Provider shall render services to the DFFE / MLRF in accordance with the Project Plan and Project Scope.
 - The amounts are inclusive of VAT and all disbursements shall be paid in South African Rands.
 - The Department / MLRF reserves the right to, after consultation with the successful Service Provider, increase, reduce or cancel the budget.

- Disbursements of project funding will be agreed on for each project and disbursements will be made on agreed and verified deliverables and indicators (targets) that are included in the Project Plan
- The successful Service Provider shall provide the Department / MLRF with an original tax invoice for the services rendered. Once the Department / MLRF has approved such an invoice and is satisfied with the services rendered as outlined in the Project Plan, it will make payment to the successful Service Provider within 30 days of approval of such a request.
- The successful Service Provider is required to submit the following documents with each invoice:
 - Acting letter of the manager of SP (if applicable).
 - Monthly/Period Project Progress Report.
- The Department / MLRF requires that a new order number be raised after 1 April of each of the financial years of the contract period.

11. ENQUIRIES

11.1. Should you require any further information in this regard, please do not hesitate to email:

Name	Email address
Ms. Nomlibo Fono	NFono@dfre.gov.za
Mr. Dyondzo Machimana	DMachimana@dfre.gov.za

Annexure B1

Annexure B1-Detailed Deliverables and Costing

Costing Activity	Duration (Day/Months)	Total Costs
1. Develop baseline conditions.		
Data and information collection from secondary sources		
Develop a comprehensive profile of the study site		
Develop a set of criteria for assessment		
2. Field work.		
Identify required data and information		
Conducting field surveys		
Designing a questionnaire form		
Pilot survey and feedback		
3. Data analysis and socio-economic assessment		
Data entry and verification		
Data analysis		
Socioeconomic impacts assessment and identification of main areas of concern		
4. Develop a conceptual framework for sustainable development		
participatory approach should be followed to ensure that all stakeholders and affected groups are involved in deciding whether the development of new alternatives can be pursued		
Grand Total		

Annexure B1

Disbursements

Item #	Unit Rate	Quantity	Cost Estimated
Travelling (by Vehicle)	R46.11		
Venue Hire	R500.00		
Accommodation	R900.00(Breakfast & Super not Included) [for management and employees, excludes accommodation for fishers as their cost will be covered on logistics when the need arises]		
Consumables	R250.00		
Per diem	R250.00		
Other	-	-	
Sub-Total			

Cost of Deliverables + Cost of Disbursements		(VAT inclusive) R
R	R	

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.

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:

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

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:

$$\begin{array}{ccc} \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\ \\ \mathbf{Ps = 80 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)} & \mathbf{or} & \mathbf{Ps = 90 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)} \end{array}$$

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 (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
51% Black ownership	N/A	8	N/A	
50% Women ownership	N/A	4	N/A	
Youth ownership	N/A	4	N/A	
Disability	N/A	4	N/A	
Non-compliant contributor	N/A	0	N/A	

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:	.....

