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 Fax: (013) 752 2917

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WESTERN CAPE
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 2 Old Paarl Road
 Office 205, 2nd Floor
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BID NO: SCMU: 09 - 2023/24

REQUEST FOR BIDS

TERMS OF REFERENCE FOR PUBLIC HIGHER EDUCATION INSTITUTIONS (HEIs), RESEARCH COUNCILS, AND NATIONAL RESEARCH FACILITIES TO IMPLEMENT THE RECOMMENDATIONS AND CONTINUE WITH RESEARCH OF THE FOURTH INDUSTRIAL REVOLUTION RESEARCH CHAIR OF THE ETDP SETA.

1. INTRODUCTION

The Education, Training and Development Practices (ETDP) Sector Education and Training Authority (SETA) Research Chair Initiative (RCI) is an intervention specifically aimed at creating strategic partnerships with public universities, research councils, and national research facilities in South Africa in order to create research excellence and promote leadership in the Education, Training and Development (ETD) field. Public HEI, research councils, and national research facilities with research expertise, capacity and interest in the Education, Training and Development sector (ETD) will serve as a home base for the establishment of ETDP SETA Research Chair.

The RCI is a knowledge and human resource development intervention aimed at strengthening and improving the research capacity of the ETDP SETA to produce high-quality research and post-graduate students for the ETD sector, and to provide technical research support and capacity to the ETDP SETA to deliver on sector skills planning across the various ETDP SETA constituencies and areas of interest, such as the Fourth Industrial Revolution (4IR). The Research Chair should be led by an expert in a particular field of study in the public universities, research councils, and national research facilities who will lead a specific research initiative. As a result of this research project being implemented as a research chair initiative, it would be limited to only public universities, research councils, and national research facilities.

From the period January 2020 to June 2021, the ETDP SETA entered into an agreement with one of the public HEIs to establish a research chair that conducted research on *"the implications of the Fourth Industrial Revolution (4IR) in the education, training and development practices sector"*.

The study recommended an urgent need for staff training in the three ETD subsectors, enabling professionals to respond to the demands of the 4IR and be competent in using teaching and learning technologies. Those subsectors are public Schooling, Early Childhood Centres, and TVET Colleges. The study recommended 12-month short learning programmes (SLPs) at NQF L 6-7 for three of its subsectors, namely Schooling, TVET Colleges, and Early Childhood Development (ECD), and the programmes were:

- Digital Citizenship, Digital Literacy, Digital Fluency.

Based on the above, the ETDP SETA requests proposals from public universities, research councils and national research facilities with the knowledge, expertise and resources to manage a Research Chair that seeks to understand digital citizenship, digital maturity, and digital fluency in TVET colleges in South Africa for the period 2023/24–2025/26. This will involve continuous investigation, reflection, and improvement of the programmes' implementation.

The ETDP SETA reserves the right not to award the bid.

2. PURPOSE AND OBJECTIVES

The ETDP SETA would like to contract a public university/research council/national research facility to conduct action research that seeks to understand the implementation of digital citizenship, digital maturity, and digital fluency in TVET colleges in South Africa. This research will involve developing relevant models and manuals, facilitating programme development and improvement, building relationships, and hosting events.

3. OVERVIEW

The focus of this project is to capacitate TVET College lecturers on how to use technological devices and be able to innovate with such tools. Such ability to innovate is aimed at improving these professionals' information literacy skills and enabling them to leverage technology to create new knowledge, and new opportunities and complement their critical thinking, whilst at the same time providing the sector with insights on what works and what doesn't in the context of teaching and learning using technology.

4. PROJECT REQUIREMENTS

The scope of work is to conduct action research that seeks to understand digital citizenship, digital maturity, and digital fluency in TVET colleges in South Africa. This research will involve developing relevant models and manuals, facilitating programme development and improvement, building relationships, and hosting events.

Further to the above, the following general outputs are expected from the research chair:

- Research report which gauges digital citizenship in TVET colleges
- Research report which gauges digital fluency in TVET colleges
- Research report which gauges digital maturity in TVET colleges
- A manual that provides students and TVET college lecturers with guidance on how technologies entrusted to them should be used.
- Digital maturity model to provide students and TVET college lecturers with guidance on the steps required to move to the next level of maturity.
- Make presentations to ETDP SETA governing structures and stakeholders as may be required.

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- Provide articles emanating from the research.

Additional outcomes from the research chair will be the following:

- Attract and retain excellent researchers for the ETD sector through the internship programme: a minimum of 1 PhD and 1 Master's Students and thus produce high quality post graduate students and research outputs for the hosting public HEI specifically and ETD sector in general.
- Strengthen and improve research capacity in the ETDP SETA.

The appointed research chair will report to the **Senior Research Specialist** of the ETDP SETA through the project plans. These project plans will indicate timelines, milestones, and deliverables for the project. The project plans will be an annexure of the Service Level Agreement (SLA) and form the basis for monitoring and reporting. The appointed research chair will work closely with the Research and Skills Planning Unit to collectively plan the methodology, activities, timelines and deliverables. However, these must form part of the initial proposal by the research chair.

Payment will be made in accordance with agreed payment schedule contained in the SLA and must be denominated in South African Rand value. The research chair should submit a detailed **ALL-INCLUSIVE BUDGET** for the project. No additional fees will be entertained thereafter.

Deliverables

The key deliverables for this project are as follows:

- I. **Project Execution Plan (or Inception Report)**
 - A detailed work plan outlining the planned activities, resource tools and allocation, costs, timelines (realistic and with key milestones) and tangible deliverables.
- II. **Drafts and Final reports**
 - Research report which gauges **digital citizenship** in TVET colleges
 - Research report which gauges **digital fluency** in TVET colleges
 - Research report which gauges **digital maturity** in TVET colleges
 - A manual that provides students and TVET college lecturers with guidance on how technologies entrusted to them should be used.
 - **Digital maturity model** to provide students and TVET college lecturers with guidance on the steps required to move to the next level of maturity.
- III. **Publications**
 - Provide articles emanating from the research.

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Key Deliverables for each financial year

NO	FINANCIAL YEAR	ITEMS
1.	2023 - 2024	<ol style="list-style-type: none"> 1) Project Plan (or Inception Report): A detailed work plan outlining the research approach, resource tools and allocation, costs, timelines (realistic and with key milestones) and deliverables including planned consultations with key informants and a project management and communication protocol document. 2) -Recruited Masters and PhD Interns 3) -Theory of Change/Instruments for gathering Labour Market Intelligence. 4) PowerPoint Presentation for Management and Governance structures. 5) -Graphical Representation Summary of the Final Report. 6) At least 2 article publications (or proof of submission to) in a reputable journal. 7) Proof Reading and Report packaging services. 8) Progress report on the study
2.	2024 - 2025	<ul style="list-style-type: none"> -Project Plan -Project Administration -Theory of Change/Instruments for gathering Labour Market Intelligence. -Presentations as required -Progress report on interns -Proof Reading and Report packaging services. -Draft and final reports -Graphical Representation Summary of Final Report. - At least 2 article publications (or proof of submission to) in a reputable journal
3	2025 - 2026	<ul style="list-style-type: none"> -Project Plan -Project Administration -Theory of Change/Instruments for gathering Labour Market Intelligence. -Presentations as required -Progress report on interns. -Proof Reading and Report packaging services. -Draft and final reports -Graphical Representation Summary of Final Report. - At least 2 article publications (or proof of submission to) in a reputable journal
4	2026 - 2027	<ul style="list-style-type: none"> -Project Plan -Project Administration -Theory of Change/Instruments for gathering Labour Market Intelligence. -Presentations as required

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		<ul style="list-style-type: none"> -Progress report on interns. -Draft and final reports -Graphical Representation Summary of Final Report. - At least 2 article publications (or proof of submission to) in a reputable journal
5	2027 - 2028	<ul style="list-style-type: none"> -Project Plan -Project Administration -Theory of Change/Instruments for gathering Labour Market Intelligence. -Presentations as required -Graphical Representation Summary of Final Report. -Recruited Masters and PhD Interns. -Draft and final reports - At least 2 article publications (or proof of submission to) in a reputable journal -Project close-out report

5. DURATION OF THE AGREEMENT

The research chair will be appointed for the period of five (5) consecutive years and will be expected to provide milestone reports within the period of three (3) to six (6) months during this period.

6. EVALUATION CRITERIA

THE ETDP SETA applies the provisions of the PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, ACT NO 5 OF 2000 and Preferential Procurement Regulations, 2022. The evaluation will be guided by ETDP SETA procurement policy.

Folder A (USB) must have documents for Stage 1

6.1. STAGE 1 [Folder A (USB)]

The evaluation of this bid shall include functionality whereby the bids will be evaluated in terms of the evaluation criteria embodied in the bid documents.

- 6.1.1. The minimum qualifying score for functionality will be **80 points** and bids that fail to achieve the minimum qualifying score will be disqualified.
- 6.1.2. Only bids that achieved the minimum qualifying score for functionality will be evaluated further in accordance with the 80/20 preference point systems prescribed in Preferential Procurement Regulations **5 and 6**.

Please note: Only proposals from the Public Higher Education Institutions as noted by the Department of Higher Education and Training <https://www.dhet.gov.za/SitePages/UniversitiesinSA.aspx> will be considered.

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The evaluation criteria for functionality will be as below:

NO	QUALIFYING CRITERIA FOR SHORTLISTING	POINTS
1.	<p>Organisation's experience and reference letters: Organisation's proof of conducting research in ETD and or related field. (Provide signed proof on the referee's company letterhead)</p> <p>1.1. Reference letters signed and in the clients' letterheads: (10)</p> <ul style="list-style-type: none"> ○ Five (5) or more references = 10 points ○ 3 to 4 references = 5 points ○ Less than 3 references = 0 points <p>1.2. The cumulative experience (from the above letters): (10)</p> <ul style="list-style-type: none"> ○ 5 years and above = 10 points ○ 3 - 4 years = 5 points ○ Less than 3 years = 0 points <p>*[Each reference must clearly indicate;</p> <ul style="list-style-type: none"> • the name of the bidder and the project • objectives of the project (nature of the project) • duration of the project • recommendation and contact details of the referee as well as proof of completed project(s) and • must be signed. <p>NB: If any of the above information is omitted/missing, will lead to the reference letter(s)and experience not allocated points.</p>	20
2.	<p>Capacity to deliver: Profile of key staff and CV's to be attached.</p> <p>2.1. Project Team Structure (20)</p> <p>The project team structure should comprise of but not limited to 1xproject manager/leader (3 points), senior researcher (3 points), 3xfield workers (junior researchers) (6 points, 2 points for each junior researcher), 1xqualitative/quantitative researchers (3 points), 1xreport writer/editor (2 points), 1xproject administrator (3 points).</p> <ul style="list-style-type: none"> ○ Project team structure with all positions above with a minimum of 3 junior researchers = 20 points <p><i>Points will be allocated according to the positions provided as indicated in brackets above.</i></p> <p>NB: Project Team structure with no names and roles of personnel will not be considered.</p>	50

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	<p>2.2. Relevant qualification of Project Manager/leader (attach certified copies of Qualifications) (10)</p> <p><i>PhD degree Qualification is a minimum requirement for the Project Manager</i></p> <ul style="list-style-type: none"> ○ <i>PhD degree Qualification or above =10 points</i> ○ <i>Qualification below PhD degree = 0 points</i> <p>2.3. Senior researcher (attach CV) (10)</p> <ul style="list-style-type: none"> ○ <i>5 years and above = 10 points</i> ○ <i>3 - 4 years = 5 points</i> ○ <i>Less than 3 years = 0 points</i> <p>2.4. Relevant experience of Project Manager/leader (Research Chair) in publishing 4IR-related articles (Attach 4IR-related published articles where the project manager is or one of the authors) (10)</p> <ul style="list-style-type: none"> ○ <i>5 articles and above = 10 points</i> ○ <i>3- 4 articles = 5 points</i> ○ <i>1 -2 articles = 3 points</i> ○ <i>Below 1 articles = 0 points</i> <p>NB: To capture the experience of the Project Manager/Leader, bidders are requested to utilise the table in Annexure A below. Failure to do so will lead to the points on the experience of the Project Manager not being allocated.</p>	
3.	<p>A 5-year Project Plan indicating what will be happening from year to year.</p> <p>The plan must include, but not limited to, the following:</p> <p>A realistic and detailed project plan needs to be provided. The research project plan needs to indicate the following sections:</p> <ul style="list-style-type: none"> a) Comprehensive Research process and methods (indicating among other sections; the research participants, key informants from various relevant organisations, plan to respond to each research question) (5 points). b) Comprehensive Plan for partnerships with relevant stakeholders (3 points) c) Timelines (within the prescribed period of 60 months) (3 points) d) Comprehensive Plan for supervising and hosting Masters and Doctoral students (4 points) e) Comprehensive Plan for skills transfer to the ETDP SETA Research team (2 points) f) Plan for models and manuals to facilitate program development and improvement (4 points) g) Comprehensive Plan for publishing articles emanating from the research to related peer-reviewed journals (3 points) 	30

	<p>h) All-inclusive (VAT) detailed budget showing items (4 points). The budget should include (Compensation of project team members, travel costs (bulk figure)/data gathering costs, desktop research costs, fieldwork costs, report writing and editing costs).</p> <p>i) Comprehensive Plan for obtaining ethical clearances and gatekeepers' letters (2 points)</p> <ul style="list-style-type: none"> o Nine of the above-mentioned deliverables out of the plan = 30 points o Points will be allocated according to the sections provided as indicated in brackets above. 	
TOTAL		100

Bidders must provide documents to justify awarding the above points, and such proof should include details of contactable references to validate the information submitted.

Points will be awarded on a sliding scale only where indicated.

Please take note of the value and scoring point system of your bid.

6.2. STAGE 2 [Folder B (USB)]

PRICING SCHEDULE DOCUMENTS

- a. Costing Model (**Price must be final, include VAT and signed**)
- b. Submit a "Unique security personal identification number (PIN) issued by SARS" **which the SETA will use to verify the bidder's tax matters prior to the award.**
- c. Invitation to Bid - **SBD1**
- d. Declaration of Interest – **SBD 4 (New)**
- e. Preferential Points Claim Form in terms of the Preferential Procurement Regulations, 2022 - **SBD 6.1 (If claiming preferential points) - this will be used to verify points to be allocated for specific goals**
- f. B-BBEE certificate or sworn affidavit (**If claiming preferential points**) – **this will be used to verify points to be allocated for specific goals.**

80/20 preference point system shall be applicable as follows:

✓ Price	80
✓ Allocation of specific goals	20

In order to facilitate a transparent selection process that allows equal opportunity to all service providers, the ETDP SETA will adhere to its policy on the appointment of service providers.

7. BID CONDITIONS

The ETDP SETA Supply Chain Management Policy will apply:

1. ETDP SETA does not bind itself to appoint a bidder with the highest points.
2. The research chair should submit a detailed **ALL-INCLUSIVE BUDGET** for the project. No additional fees will be entertained thereafter.
3. ETDP SETA reserves the right to negotiate the bidder's price.
4. ETDP SETA reserve the right to cancel the bid and not award the bid to any of the bidders.
5. Bids which are late, incomplete, unsigned **will NOT** be accepted.
6. Bidders must submit a valid certified B-BBEE Certificate from SANAS Accredited Verification Agency or issued by Companies and Intellectual Property Commission (CIPC) for allocation of points for specific goals.
7. Specific goals shall not be allocated where supportive documents as stated in the bid documents are not provided as stated in the bid document.
8. Bids submitted are to hold good for a period of **90 days**.
9. Companies who bid as a joint venture must submit one valid B-BBEE certificate from SANAS Accredited Verification Agency for specific goal points.
10. Deregistered and blacklisted companies including directors/owners/individuals linked to the company will not be considered. Due diligence will be conducted with successful bidders to validate submitted information.
11. All suppliers must be registered on the Central Supplier Database. No bid shall be awarded to any supplier that is not registered on the Central Supplier Database.
12. Companies that are in the process of de-registration in the CIPC will not be considered.
13. The ETDP SETA remains the sole owner and custodian of all content, material, or any other form of development. No information of or on behalf of the ETDP SET may be shared, during the duration or after the closing period of the project. It remains the responsibility of the appointed service provider to hand over all material to the ETDP SETA. Should a service provider wish to have the ETDP SETA as a referral, permission for this must be sought.

8. BID DOCUMENTS / PROPOSAL PACKS

Bid documents for participation **must** be downloaded from the ETDP SETA website: www.etdpseta.org.za, Main Menu > Supply Chain Management > Open Tenders as from **12h00 on 12 January 2024**.

Bidders must submit technical and financial proposals in **one (1) USB** clearly marked "**Folder A-Technical Proposal**" and "**Folder B- Financial Proposal**".

Folder B - (Financial Proposal) Costing Model (**Price must be final, include VAT and signed**), Submit a "*Unique security personal identification number (PIN) issued by SARS*" **which the SETA will use to verify the bidder's tax matters prior to the award**, Invitation to Bid - **SBD1**, Declaration of Interest – **SBD 4 (New)**, Preferential Points Claim Form in terms of the Preferential Procurement Regulations, 2022 -**SBD 6.1 (If claiming preferential points) - this will be used to verify points to be allocated for specific goals** and B-BBEE certificate or sworn affidavit (**If claiming preferential points**) – **this will be used to verify points to be allocated for specific goals**.

All Bids/Proposals (**completed in [one (1) USB]**) must be courier or hand delivered to:

The ETDP SETA – Head Office
ETDP SETA House
2-6 New Street
Ghandi Square
Johannesburg South - CBD
2091

Submissions can be delivered into the tender box between **08h00 and 16h30 Monday to Friday BEFORE** the closing date and time of **11h00 on 05 February 2024**.

No late submission will be accepted!

9. CLOSING DATE

All Proposals should reach the ETDP SETA Offices on or before **11h00 on 05 February 2024**.

10. CONTACT PERSON

NO telephonic or any other form of communication relating to this bid will be permitted with any other ETDPSETA member of staff either by Bidders (as collective bidding team or individual of the bidding team), representative of Bidders, associates of Bidders, shareholders of Bidders, other than with the named individual stated below. ANY MEANS OF ATTEMPTING TO INFLUENCE THE ADJUDICATION PROCESS OR OUTCOMES OF THE ADJUDICATION PROCESS WILL RESULT IN IMMEDIATE DISQUALIFICATION OF THE ENTIRE BID. All enquiries regarding this bid must be in writing only and be directed to:

Supply Chain Manager: Email: Tenderers@etdpseta.org.za

Note: Blacklisted companies appearing on the National Treasury database and prohibited from conducting business with public entities, will be disqualified.

ANNEXURE A

Bidders are required to provide references for Project Manager. Failure to provide references will lead to disqualification:

1. PROJECT MANAGER/LEADER (Research Chair) EXPERIENCE

Name of Project Manager/leader (Research Chair): _____

Project/Company name	Position/Role	Responsibilities	Start date	End date	Reference (Name & Surname)	Reference (Position)	Reference (Contact details)

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