

QUOTATION STANDARD BIDDING DOCUMENT ANNEXURE

QUOTATION FOR THE FOLLOWING SPECIFIED SUPPLY REQUIREMENTS

QUOTATION NUMBER:	NRF/SAEON/ICT/04/2016		CLOSING DATE:	18 May 2015
QUOTATION DESCRIPTION				
Provision of support services for the SAEON Shared Platform as per attached Annexures				
The quotation is provided on the attached SBD3 Quotation form as issued by the National Research Foundation.				
“BID” Definition - “bid” includes written price quotations, advertised competitive bids or proposals				
Validity period from date of closure:	90	days		
Preferential Procurement System applicable (points for price : points for procurement preference): 80:20 or 90:10.				
This quotation is subject to the Preferential Procurement Policy Framework Act and its 2011 Regulations, includes the National Treasury General Conditions of Contract available on the NRF website and on the National Treasury website.				
Acceptance of this quotation is through receipt of a duly authorised and signed written offer form (SBD7 Contract Form) from the National Research Foundation.				
It is acknowledged that late quotations are not considered.				
Quotations are submitted on the National Treasury official forms with additional information supplied on attached supporting schedules.				
NAME OF SERVICE PROVIDER				
REPRESENTED BY				
POSTAL ADDRESS				
PHYSICAL ADDRESS				
TELEPHONE NUMBER	CODE	NUMBER		
CELL PHONE NUMBER	CODE	NUMBER		
E-MAIL ADDRESS				
VAT REGISTRATION NUMBER				

COMPANY REGISTRATION NUMBER					
DESCRIBE PRINCIPAL BUSINESS ACTIVITIES:					
TYPE OF COMPANY/FIRM [Tick applicable box]					
Partnership/Joint Venture/Consortium	<input type="checkbox"/>	One person business/sole proprietor	<input type="checkbox"/>		
Close Corporation	<input type="checkbox"/>	Company	<input type="checkbox"/>		
(Pty) Limited	<input type="checkbox"/>	Other	<input type="checkbox"/>		
COMPANY CLASSIFICATION [Tick applicable box]					
Manufacturer	<input type="checkbox"/>	Supplier	<input type="checkbox"/>		
Professional Service Provider	<input type="checkbox"/>	Other service providers e.g. transporter, etc.	<input type="checkbox"/>		
TAX COMPLIANCE STATUS [Tick applicable box]					
An original and valid tax clearance certificate has been submitted?			<table border="1" style="float: right; border-collapse: collapse;"> <tr> <td style="width: 50px; text-align: center;">YES</td> <td style="width: 50px; text-align: center;">NO</td> </tr> </table>	YES	NO
YES	NO				
PREFERENCE POINTS CLAIMED [Tick applicable box]					
Has a Preference Claim form (SBD6.1) claiming your Preference Points been submitted (a B-BBEE status level verification certificate must support preference points claimed)			<table border="1" style="float: right; border-collapse: collapse;"> <tr> <td style="width: 50px; text-align: center;">YES</td> <td style="width: 50px; text-align: center;">NO</td> </tr> </table>	YES	NO
YES	NO				
If Yes, who was the B-BBEE certificate issued by: [Tick Applicable Box]					
An accounting officer as contemplated in the Close Corporation Act (CCA)			<input type="checkbox"/>		
A verification agency accredited by the South African Accreditation System (SANAS)			<input type="checkbox"/>		
A registered auditor			<input type="checkbox"/>		
ACCREDITED REPRESENTATIVE [Tick applicable box]					
Accredited representative in South Africa for the goods/services/works offered. If Yes, please enclose proof.			<table border="1" style="float: right; border-collapse: collapse;"> <tr> <td style="width: 50px; text-align: center;">Yes</td> </tr> <tr> <td style="width: 50px; text-align: center;">No</td> </tr> </table>	Yes	No
Yes					
No					
LEGAL IDENTITY PROOF [Tick applicable box]					
Certified copies of Certificate of Incorporation (as per entity type) are enclosed			<table border="1" style="float: right; border-collapse: collapse;"> <tr> <td style="width: 50px; text-align: center;">Yes</td> </tr> <tr> <td style="width: 50px; text-align: center;">No</td> </tr> </table>	Yes	No
Yes					
No					

1. PREFERENCE POINTS CLAIMED (SBD 6.1)

In terms of Regulation 5 (2) and 6 (2) of the Preferential Procurement Regulations, preference points are claimed for attaining the B-BBEE status level of contribution in accordance with the table set out below:

B-BBEE Status Level of Contributor per B-BBEE Certificate	Number of points per system		B-BBEE Status Level of Contributor per B-BBEE Certificate	Number of points per system	
	90/10	80/20		90/10	80/20
1	10	20	6	3	6
2	9	18	7	2	4
3	8	16	8	1	2
4	5	12	0	0	0
5	4	8			

B-BBEE STATUS LEVEL OF CONTRIBUTION CLAIMED IN TERMS OF THE ABOVE TABLE:

Level	=	80:20	90:10
	=		

(Points claimed are substantiated by means of a B-BBEE certificate issued by a Verification Agency [accredited by SANAS or a Registered Auditor approved by IRBA or an Accounting Officer as contemplated in the CCA] which is on file with you through our supplier registration on your supplier database and is available if required for validation).

I/we, the undersigned, who is/are duly authorized to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBEE status level of contribution of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I/we 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 the SBD6.1.
- iii. In the event of a contract being awarded as a result of points claimed as shown above, the contractor has filed the documentary proof in the NRF supplier database when registered and, upon request, furnish documentary proof to the satisfaction of the NRF that the claims are correct;
- iv. I/we acknowledge that if the B-BBEE status level of contribution has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the NRF may, in addition to any other remedy it may have –
 - a) Disqualify the contractor from the bidding process;
 - b) Recover costs, losses or damages it has incurred or suffered as a result of our 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) Restrict the contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, from obtaining business from any organ of state for a period not exceeding ten (10) years, after the audi alteram partem (hear the other side) rule has been applied; and forward the matter for criminal prosecution

2. SUB-CONTRACTING (STANDARD BIDDING DOCUMENT 6.1)

Will any portion of the contract be sub-contracted?	Yes	No
If Yes, indicate:		
(i) What percentage of the contract will be subcontracted?	%	
(ii) The name of the sub-contractor?		

(iii) The B-BBEE status level of the sub-contractor?		
(iv) Whether the sub-contractor is an EME?	Yes	No

I/we, the undersigned, who is/are duly authorised to do so on behalf of the company/firm, certify that the information is true and correct and I/we acknowledge that:

- i. A Bidder will not be awarded points for B-BBEE status level if it is indicated in the Bid documents that such a Bidder intends sub-contracting more than 25% of the value of the contract to any other enterprise that does not qualify for at least the points that such a Bidder qualifies for, unless the intended sub-contractor is an EME that has the capability and ability to execute the sub-contract.
- ii. A Bidder awarded a contract may not sub-contract more than 25% of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level than the Bidder concerned, unless the contract is sub-contracted to an EME that has the capability and ability to execute the sub-contract.

3. DECLARATION OF INTEREST (SBD 4)

Any legal person, including persons employed by the State¹, or persons having a kinship with persons employed by the State, including a blood relationship, may make an offer or offers in terms of this invitation to Bid (includes an advertised competitive Bid, a limited Bid, a proposal or written price quotation). In view of possible allegations of favouritism, should the resulting Bid, or part thereof, be awarded to persons employed by the State, or to persons connected with or related to them, it is required that the Bidder or his/her authorised representative, declare his/her position in relation to the evaluating/adjudicating authority where:

- The Bidder is employed by the State; and/or

- The legal person on whose behalf the Bidding Document is signed, has a relationship with persons/s person who is/are involved in the evaluation and or adjudication of the Bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and/or adjudication of the Bid.

In order to give effect to the above, the following questionnaire must be completed and submitted with this Bid:

- Full Name of Bidder or his/her representative

- Identity Number:

- Position occupied in the Company (director, trustee, shareholder², member):

- Registration number of company, enterprise, close corporation, partnership agreement or trust:

- Tax Reference Number:

- VAT Registration Number:

<ul style="list-style-type: none"> The names of all directors/trustees/shareholders/members, their individual identity numbers, tax reference numbers and, if applicable, employee/PERSAL numbers must be indicated in a separate schedule including the following questions: 				
	Schedule attached with the above details for all directors/members/shareholders	Yes	No	
<ul style="list-style-type: none"> Are you or any person connected with the Bidder presently employed by the state? If so, furnish the following particulars in an attached schedule: 			Yes	No
	Name of person/ director/ trustee/ shareholder/member:			
	Name of state institution at which you or the person connected to the Bidder is employed			
	Position occupied in the state institution			
	Any other particulars:			
<ul style="list-style-type: none"> If you are presently employed by the State, did you obtain the appropriate authority to undertake remunerative work outside employment in the public sector? If Yes, did you attach proof of such authority to the Bid document? If No, furnish reasons for non-submission of such proof as an attached schedule (Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the Bid.) 			Yes	No
<ul style="list-style-type: none"> Did you or your spouse or any of the company's directors/ trustees /shareholders /members or their spouses conduct business with the State in the previous twelve months? If so, furnish particulars as an attached schedule: 			Yes	No
<ul style="list-style-type: none"> Do you, or any person connected with the Bidder, have any relationship (family, friend, other) with a person employed by the State and who may be involved with the evaluation and or adjudication of this Bid? If so, furnish particulars as an attached schedule. 			Yes	No
<ul style="list-style-type: none"> Are you, or any person connected with the Bidder, aware of any relationship (family, friend, other) between any other Bidder and any person employed by the State who may be involved with the evaluation and or adjudication of this Bid? If so, furnish particulars as an attached schedule: 			Yes	No
<ul style="list-style-type: none"> Do you or any of the directors/ trustees/ shareholders/ members of the company have any interest in any other related companies whether or not they are bidding for this contract? If so, furnish particulars as an attached schedule: 			Yes	No

4. DECLARATION OF BIDDER'S PAST SCM PRACTICES (SBD 8)

<ul style="list-style-type: none"> Is the Bidder or any of its directors listed on the National Treasury's Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector? If Yes, furnish particulars as an attached schedule: 	Yes	No
<ul style="list-style-type: none"> Is the Bidder or any of its directors listed on the Register for Tender Defaulters in terms of Section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)? If Yes, furnish particulars as an attached schedule: 	Yes	No
<ul style="list-style-type: none"> Was the Bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five years? If Yes, furnish particulars as an attached schedule: 	Yes	No
<ul style="list-style-type: none"> Was any contract between the Bidder and any organ of state terminated during the past five years on account of failure to perform on or comply with the contract? If Yes, furnish particulars as an attached schedule: 	Yes	No

The Database of Restricted Suppliers and Register for Tender Defaulters resides on the National Treasury's website (www.treasury.gov.za) and can be accessed by clicking on its link at the bottom of the home page.

5. CERTIFICATE OF INDEPENDENT BID DETERMINATION (SBD 9)

<p>I, the undersigned, in submitting this Bid in response to the invitation for the Bid made by the NATIONAL RESEARCH FOUNDATION, do hereby make the following statements that I certify to be true and complete in every respect:</p>		
<ul style="list-style-type: none"> I have read and I understand the contents of this Certificate; 	Yes	No
<ul style="list-style-type: none"> I understand that the Bid will be disqualified if this Certificate is found not to be true and complete in every respect; 	Yes	No
<ul style="list-style-type: none"> I am authorised by the Bidder to sign this Certificate, and to submit the Bid, on behalf of the Bidder; 	Yes	No
<ul style="list-style-type: none"> Each person whose signature appears on the Bid has been authorised by the Bidder to determine the terms of, and to sign, the Bid on behalf of the Bidder; 	Yes	No

For the purposes of this Certificate and the accompanying Bid, I understand that the word "competitor" shall include any individual or organisation, other than the Bidder, whether or not affiliated with the Bidder, who:

- Has been requested to submit a Bid in response to this Bid invitation;
- Could potentially submit a Bid in response to this Bid invitation, based on their qualifications, abilities or experience; and
- Provides the same goods and services as the Bidder and/or is in the same line of business as the Bidder

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 consortium³ will not be construed as collusive bidding.

In particular, without limiting the generality of paragraphs above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:

- a) Prices;
- b) Geographical area where product or service will be rendered (market allocation);
- c) Methods, factors or formulas used to calculate prices;
- d) The intention or decision to submit or not to submit, a Bid;
- e) The submission of a Bid which does not meet the specifications and conditions of the Bid; or
- f) Bidding with the intention not to win the Bid.

In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this Bid invitation relates.

The terms of this 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.

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

³ 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.

6. STANDARD BIDDING DOCUMENTS DECLARATION

The following documents are deemed to form and be read and construed as part of this agreement even where integrated in this document:

Declaration of Interest (SBD4)

Original Tax Clearance Certificate unless already on file with the NRF

Preference claims for Broad Based Black Economic Empowerment Status Level of Contribution in terms of the Preferential Procurement Regulations 2011 (SBD6.1)

Where a valid BBBEE Certificate is not on file with the NRF, please attach

Declaration certificate for Local Production and Content for Designated Sectors (SBD6.2)
Declaration of Bidder's past SCM practices (SBD8);
Certificate of Independent Bid Determination (SBD9)
General Conditions of Contract

The obligation to complete, duly sign and submit these declarations included in this SBD declaration pack cannot be transferred to an external authorized representative, auditor or any other third party acting on behalf of the legal entity.

I declare that I have had no participation in any collusive practices with any Bidder or any other person regarding this or any other procurement.

I certify that the information furnished in these declarations (Tax compliance status, SBD4, SBD5 where applicable, SBD6.1, SBD 6.2 where applicable, SBD8, SBD9) is correct and I accept that the NRF may reject the Offer or act against me should these declarations prove to be false.

I confirm that I am duly authorised to sign this SBD declaration pack by the Chief Financial Officer or other legally responsible person nominated in writing by the Chief Executive or Senior Member/Person with management responsibility (Close Corporation, Partnership or Individual)

NAME (PRINT)	
CAPACITY	
SIGNATURE	
NAME OF FIRM	
DATE	

WITNESSES	
1	_____
2	_____
Date	_____

Annexure A: Specifications

Background

SAEON requires services to assist with the maintenance and support, and development of additional functionality for its Data Portal and Shared Meta-data Platform (see Annexure C for supplementary material).

Scope of Work

Scope of work includes the day-to-day support of the SAEON Shared Platform, a Plone-based content management system that underpins several operational data portals, as well as the SAEON MetaCAT and corporate website installations.

Suppliers will be expected to provide prices for the following three sets of tasks:

1. A minimum support capability (average of 32 hours per month)
2. An additional support capability to be utilised as required (32 hours per month additional)
3. A special provision for 120 hours of immediate maintenance and support tasks.

Specifications

Specifications are as follows:

1. Support as per the details in Annexure B.
2. Additional development work, involving the following, but not limited to it:
 - a. Development of additional harvesting routines to accommodate the DDI schema and format (common for social sciences data);
 - b. Review of current harvesting functions and protocols with a view to
 - i. Ensuring that incremental harvesting is done, and that the Shared Platform is able to keep additional information for each meta-data record;
 - ii. Automation of a subsequent DOI registration in the DataCite repository, using their API and meta-data schema.
 - c. Automation of harvesting or meta-data push routines for content that is created routinely in the Shared Platform (i.e. documents, pages, stubs, images, folders, etc.)
 - d. Extension of the information required of Custodians to accommodate the requirements of trusted digital repositories.
 - e. Review and refinement of the interfaces between data sources and meta-data.
 - f. Ad-hoc assistance and testing participation for the above.
3. Technical documentation of the existing system functionality, with a twofold objective:
 - a. Technology transfer to service providers and internal staff.
 - b. Release of selected components as open source resources.

Evidence of Capability

To successfully execute the tasks, the supplier will have to provide the following expertise:

Thorough knowledge of the following

(attested by clients, web-based portfolio, or formal training)

1	Linux and Ubuntu	Go/ No Go
2	Apache, NGNX, Varnish, and related web hosting technologies	Go/ No Go
3	Plone versions 3 and 4	Go/ No Go

The following will be highly beneficial

(attested by clients, web-based portfolio, or formal training)

1	Knowledge of meta-data standards and schema: Dublin Core, ISO 19115 family, FGDC, EML, DDI	25
2	Knowledge of geospatial technologies and open-source software: GeoNetwork, GeoNode, GeoServer, and PostGres	25
3	Knowledge of MetaCAT and Morpho	25

Prior exposure to SAEON Systems

(please provide applicable purchase order or SLA)

1	Corporate Website (www.saeon.ac.za)	15
2	Data portals (data.dirisa.org)	10

Evaluation Criteria

Expertise marked as 'Go/ No Go' is mandatory, while the numeric values indicate the weight that will be applied to other criteria. Prior exposure to SAEON systems will be highly beneficial and will allow for less time spent on familiarization with existing systems.

Evaluation will be based on an 80:20 schema, with 80 points based on the above criteria, and 2-0 points based on BBBEE score. Bidders that do not meet mandatory requirements will not be considered.

Format of Quotation

Suppliers must provide three sub-prices, one for each of the three tasks defined in the scope of work. See form SBD 3.3 (Attached).

Validity

The rate quoted must remain valid for a period of ninety (90) days from the closing date of this Request for Quotations (below) and, if successful, for the full duration of the project.

Closing time and date

Completed quotations must be received by 12:00 on Friday 18 May 2015.

Address

Quotations must be delivered by hand to:

SAEON National Office

The Woods, Block C

41 De Havilland Crescent

Persequor TechnoPark (off Meiring Naude Ave) Pretoria

Disclaimer

SAEON will neither consider late and/or incomplete submissions, nor ineligible bidders.

Contacts:

Bid Process: Cindy Hlanze

Technical inquiries: Wim Hugo

cindy@saeon.ac.za

wim@saeon.ac.za

012 349 7720

Annexure B: Routine Maintenance

Maintenance is performed against an issue tracker, with weekly liaison meetings to follow up on progress.

Tasks and issues are prioritized by the SAEON Chief Data and Information Officer or delegated employee. Expected Service Levels are as follows:

Task or Issue Severity Level	Acknowledgement Required	Response Formulated	Resolution
Emergency	Yes	As soon as possible.	Highest priority. Hours to be agreed and provisioned if not available.
High	Yes	Within 1 working day	Highest priority within available hours
Normal	No	By next weekly meeting	Lowest priority within available hours
Low/ Deferred	No	By next weekly meeting	Lowest priority, avoid support hours.

As can be seen from the table, the service provider will have to respond to notifications that are flagged as 'Emergency' or 'High' priority within a short space of time, even though resolution may take an unspecified time..

Tasks include assistance with backups, load balancing and site optimization, error tracing and corrections, and small improvements and adjustments to existing functionality.

Annexure C: SAEON Systems Overview

To access examples in data.dirisa.org, please use the following credentials:

Username: bid_user

Password: b1d_u\$3r

6.1. B.1 SAEON Shared Platform

This platform can be accessed at <http://data.dirisa.org>, and serves as a master site for a large number of sub-sites. The sites all share the same meta-data repository, services, and products. The systems are currently deployed in Plone 3.

6.2. B.2 SAEON Corporate Site

This is also deployed in Plone version 3 and can be accessed at <http://www.saeon.ac.za>,

6.3. B.3 Migration to Plone Version 4

This task will be undertaken if risks are acceptable and costs are manageable. The task will include migration of all existing platform sites (hosted at data.dirisa.org and www.saeon.ac.za), custom and third-party products, and test/operationalization of the resulting migration.

6.4. B.4 MetaCAT Support

SAEON operates an installation of MetaCAT – to be found at <http://metacat.saeon.ac.za>. More information about MetaCAT can be obtained here: <http://knb.ecoinformatics.org/software/dist/MetacatAdministratorGuide.pdf>

MetaCAT is a Java-based application that is usually deployed using Apache on Linux or Ubuntu, and uses PostGres as a database.

Support is required that entails

1. Liaison with NCEAS in the US via e-mail or video conference to escalate issues that cannot be solved locally;
2. Maintenance of a test, development, and live instance of the software.
3. User account management.

SBD 3.3 PRICING SCHEDULE – PROFESSIONAL SERVICES

NAME OF BIDDER:.....**BID REF: NRF/SAEON/ICT/04/2016**

CLOSING DATE: 18 MAY 2015

CLOSING TIME: 12:00 NOON

OFFER IS VALID FOR 90 DAYS AFTER CLOSING DATE OF BID

- i. A short proposal should accompany the quotation and should include references of existing clients that can be contacted and evidence of prior work done.
- ii. List of People who will be involved in the work

Name	ID Number or Passport Number	Number of Years of Experience

3. Pricing

Item Number	Quantity	Description	Price Vat Inclusive (ZAR)
3.1	32 hours/month	Minimum Maintenance	
3.2	32 hours/month	Additional Maintenance	
3.3	120 hours	Initial Support	

4. Period required for commencement after appointment.....

5. Total Quote Price (Vat inclusive) R.....