



ADDENDUM 2

INDEPENDENT DEVELOPMENT TRUST

NORTHERN CAPE PROVINCE

BID NOTICE No: 02/2025: 28th February 2025

**APPOINTMENT OF PROFESSIONAL SERVICE PROVIDERS FOR PANEL FOR A PERIOD OF
THREE (3) YEARS (PANEL OF PSPs)**

TENDER NO: IDTNC-PANEL-2025/6-2027/8

CLOSING DATE: 25 March 2025

PREPARED BY:

INDEPENDENT DEVELOPMENT TRUST (IDT)

IDT NC Office

**Block D Sanlam Office Park, 13 Bishops Avenue, Labram,
Kimberley
8301**

SCM CONTACT PERSON

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TECHNICAL PERSON

Name: Fazel Green

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Email Address: fazelg@idt.org.za

SPECIFY DISCIPLINE	
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BIDDER'S DETAILS	INFORMATION
Category (services rendered)	
Company Name	
Contact number	
Email address	
CSD number	
Company Physical address	

The Independent Development Trust (IDT) in the Northern Cape Province hereby invites professional service providers from suitably qualified and experienced Service Providers from; the built environment to establish a pre-approved panel of Professional Service Providers (PSPs) for infrastructure projects in Northern Cape to be utilized for a period of 36 months. The following categories of professional service providers are invited:

NOTE: Only one (1) category / discipline may be selected per each submission. As such a bidder may NOT submit one (1) submission for multiple categories / disciplines (i.e one (1) submission per one (1) category / discipline)

1. CATEGORIES/ DISCIPLINES

NO	DISCIPLINE	TICK (applicable Box)
1	Project Managers	
2	Architects	
3	Quantity Surveyors	
4	Electrical Engineers	
5	Mechanical Engineers	
6	Civil Engineers	
7	Structural Engineers	
8	Occupational Health and Safety	

Note: Bidders to ensure that the category / discipline selected in the table above is indicated on the cover page of this document.

- 1.1 Bidders must tick next to the category / discipline they are bidding for. **Only one (1) category / discipline may be selected per submission** (i.e if a PSP delivers more than one (1) of the above disciplines and the PSP wishes to submit for all such disciplines, then the PSP must submit more than one (1) bid)
- 1.2 The bidder must provide **ALL** requirements as outlined in Sections (8) and (9) of this document. Failure to comply with the requirements of section 9 of this bid document shall render the bid non-responsive and shall result in the bid being disqualified.
- 1.3 No submission shall be dependent on another submission. All requirements as outlined in this bid document shall be addressed in full per each submission.

2. BACKGROUND

2.1 IDT AS AN ENTITY

The Independent Development Trust (*hereinafter referred to as IDT*) is a Schedule 2 Public Entity governed by applicable legislative frameworks and a Deed of Trust. The organization is accountable to Parliament through the Minister of Public Works who is the Executive Authority.

The mandate of the IDT is to support and add value to the development agenda of government as indicated in the mission statement; “The IDT manages and delivers Integrated Social Infrastructure Programs on behalf of Government”.

In pursuit of this mandate, the IDT primarily operates as a strategic partner in the management, integration and implementation of certain government development programs.

The IDT has representation in all the provinces and is organized on the basis of regional/provincial offices. These offices have the authority to call for bids, conduct evaluation of bids and make recommendations to the Management Bid Adjudication Committee (MBAC) for award of bids.

3. PURPOSE OF EXPRESSION OF INTEREST / BID

The IDT as a custodian of implementing social infrastructure projects on behalf of Government and has an obligation to adhere and fully comply with the Framework for Infrastructure Delivery and Procurement Management (*hereinafter referred to as FIDPM*) in all stages of projects which require qualified and experienced Professional Service Providers (*hereinafter referred to as PSP / PSPs*). These PSPs are appointed through competitive bidding in line with the Supply Chain Management (SCM) Policy and SCM National Treasury regulation.

The purpose of this expression of interest is to pre-qualify relevant and capable PSPs from identified disciplines listed in this document in order to be enlisted on the IDT's panel of PSPs for the IDT NC region

for a period of three (3) years from the date of panel approval. Qualified PSPs will be invited on rotational basis as when the need arises. The IDT further reserves the right to cancel any invitation to submit pricing proposals / RFQs from the panel of PSPs and approach the market (open bid) for services whenever it is considered that better value in terms of time, cost and quality may be obtained by doing it that way.

Note: The IDT reserves the right to;

- (i) invite **only** pre-qualified PSPs from the panel with requisite experience and capacity to submit pricing proposals / RFQs from any of the selected type of works based on project size and complexity, advancement of certain designated groups in line with regulation 4 (1) (a), (b) or (c) of the PPPFA (Act 5 of 2000), Regulations 2017 and any response to client & project-specific requirements and demand.
- (ii) Directly allocate projects to PSP's where rates are fixed and no bidding is required / necessary

4. SCOPE OVERVIEW

4.1 Objective of this document

This document calls for PSPs accredited in the relevant disciplines listed below to submit their bid proposal in order to be enlisted in the PSPs' panel for the period of three (3) years from the date of approval of this panel:

4.1.1 Project Manager

4.1.2 Architects

4.1.3 Quantity Surveyors

4.1.4 Electrical Engineers

4.1.5 Mechanical Engineers

4.1.6 Civil Engineers

4.1.7 Occupational Health and Safety

4.1.8 Structural Engineers

4.2 Ethical Consideration

At the core of all PSPs in the Built Environment and allied professions, there is a government gazette which is based on a corresponding Act of Parliament. The gazette outlines the tasks and responsibilities typical of each profession at every construction stage, the fee structures, and the typical deliverables of each profession. Each PSP is expected to abide by any of the Professional Services Contracts available on the market which the IDT may choose to use for specific projects. These include, but are not limited to the Professional Services Agreement (PROCSA), and the CIDB Standard Professional Services Contract and their variations or adaptations that may be tailored to suit the IDT.

The obligations and responsibilities for each part are outlined in these contracts, as well as dispute resolution processes.

Ethical issues such as conflict of interest and corruption, confidentiality and copyright, are covered in the Professional Services Agreements that the IDT may choose to use for particular contracts.

5. SCOPE DESCRIPTION

5.1 Built Environment Professions

As outlined in (3.2) above, each built environment profession will be guided by a government gazette that outlines the scope of services. Other allied professions which are outside the built environment also have their scope of services, but for purposes of this document, scope of work for the built environment professions only is outlined as follows :-

- (i) For Engineering Professionals (civil, structural, mechanical, electrical etc) the scope of services and applicable rates will be in terms of the gazetted rates and services as contained in the Engineering Council of South Africa (ECSA) under section 34(2) of Engineering Professions Act, 2000 (Act No. 46 of 2000).
- (ii) For the Construction Project Management Professionals, scope of services and applicable rates will be in terms of the gazetted rates and services as contained in The South African Council for Project & Construction Management Professionals (SACPCMP) under Section 34(2) of the Project and Construction Management Profession Act, 2000 (Act 48 of 2000).
- (iii) For the Architectural Profession, scope of services and applicable rates will be in terms of the gazette rates and services as contained in The South African Council for the Architectural Profession (SACAP) under Section 34(2) of the Architectural Profession Act 2000 (Act 44 of 2000).
- (iv) For the Quantity Surveying Profession, the scope of services and applicable rates will be in terms of the gazette rates and services as contained in the South African Council for the Quantity Surveying Profession under Section 34(2) of the Quantity Surveying Profession Act 2000 (Act 49 of 2000).

5.2 Scope of Allied Professions to the Built Environment Professions

Section 3 recognizes that, increasingly, the organization may from time to time need to use PSPs which may not necessarily fall under the Built Environment, but which may be critical for successful implementation of various projects, be it on once-off or on continuous basis. The procurement of such

services will be requested via RFQ and be appointed under the relevant discipline and they will be paid under that relevant PSP's disbursements.

6. GOVERNANCE AND ACCOUNTABILITY

The IDT's Supply Chain Management Policy and Procedures will apply during the bidding process and appointment of PSPs enlisted in the panel. The successful PSPs will be held to the strictest letter of the law when complying with the governing body for the respective professional group, as explained in Sections (5.1) and (5.2) of this document. As a matter of principle for the successful outcome of the project/s, impeccable and scrupulous will not be accepted, **professional conduct** will be expected at all times.

7. PROFESSIONAL QUALIFICATIONS

Read in conjunction with Sections (8) and (9) of this document, the successful bidder/s will be one/s that is/are:

- (i) Professionally registered with the appropriate professional councils, backed by an appropriate Act of Parliament as may be required (eg ECSA, SACPCMP, SACQSP, SACAP including the allied professions not included in the Built environment);
- (ii) Have an appropriate relevant qualification, from a reputable faculty of Higher Education within South Africa.
- (iii) In the case of foreign qualifications these should be SAQA approved;
- (iv) Have a minimum of 5 years' experience in the field of specialization post acquiring professional registration.

8. SPECIAL BID CONDITIONS

- (i) At least one of the Company Directors must be professionally registered with the relevant discipline in order for the bid to be considered for evaluation. (If none of the Company Directors registered in the CK document are not registered with the relevant discipline, the bid shall be regarded as non-responsive and shall be disqualified).
- (ii) To be considered for evaluation and in line with the Preferential Procurement Regulations of 2017, bidders must at least have 51% Black ownership with any one or more of the following categories: Black people; Black people who are youth; Black people who are women; Black people with disabilities; Black people who are military veterans; Black people that formed a cooperative (primary,

secondary or tertiary co-operative); Black people living in rural areas or underdeveloped area or townships.

- (iii) The IDT shall not be liable to reimburse any costs incurred by the bidder during this bid process.
- (iv) There will be no clarification meeting, for any enquiries please contact the people listed in the cover page.
- (v) Request clarification of the bid document, if necessary, by notifying the IDT at least five (5) working days before the closing date & time, as stated in the cover page.
- (vi) Communication between the IDT and the bidder/s shall be in writing and shall be in the English language. The IDT shall not take any responsibility for non-receipt of communications from or by a bidder/s.
- (vii) There shall be no public opening of this bid.
- (viii) Evaluation of this bid shall be carried out by the IDT's Bid Evaluation Committee (BEC). The Evaluator(s) shall, if necessary, contact bidders to seek clarification of any aspect of the bid.
- (ix) Bidders are prohibited to make any alterations or additions to this bid document, except to comply with instructions issued by the IDT. All signatories to the bid offer shall initial all such alterations. Erasures and the use of masking fluid are prohibited.
- (x) It is expected that bidders are familiar with the geographical landscape of Northern Cape Province.

9. MANDATORY RETURNABLE DOCUMENTS

Failure to submit one of the mandatory requirements listed below shall result in the bid being non-responsive and shall be disqualified:

- (i) Detailed full CIPC certificate or other authentic proof of company ownership documents
- (ii) Certified ID Copies of Directors (certification not older three (3) months from bid closing date)

Certified ID Copies of Directors (certification not older three (3) months from bid closing date)

- (iii) Proof of National Treasury (NT) Central Supplier Database Registration i.e. submit a copy of CSD Master Registration Number (Supplier Number)
- (iv) Compensation for Occupational Injuries and Diseases Act Certificate (COIDA) or Federated Employers Mutual Assurance (FEMA) Insurance
- (v) Notarized Joint Venture Agreement (where applicable),
- (vi) Proof of indemnity insurance of R 3,000,000.00 (Three Million Rands) and above (Note: PI insurance required may differ from the aforementioned for each project when pricing proposals / RFQs are issued out and will be required per project)

- (vii) Fully completed and signed Standard Bidding Documents as contained in the bid document (SBD 1; SBD 4; SBD 6.1; SBD 8 and SBD 9)
- (viii) B-BBEE certificate
- (ix) **Note: Failure to comply with any of the above-mentioned requirements shall render the bid non-responsive and shall result in automatic disqualification of the bid response.**

10. EVALUATION CRITERIA

The bid evaluation criteria will be functionality based as contemplated in the Preferential Procurement Policy Framework Act, Act No. 5 of 2000 as amended in 2017 Preferential Procurement Regulations, 2011 as follows:

10.1 STAGE 1 – Functionality

NB// should a bidder select more than one (1) discipline / category, they must submit different functionality requirement for each discipline selected. (Refer to Section (1.3))

10.1.1 Evaluation Criteria

Method 2 of evaluation of tender offers is applicable.

The Bids will be evaluated on Functionality. Entities must score a minimum of 60% on functionality to qualify for further evaluation. 80/20 Preference Point System in line with Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000), Regulations 2017 will be applicable.

(a) Functionality Criteria

Criteria	Possible Maximum Score
Qualification, Registration and Experience of key personnel	50
Company's Experience in managing Building Projects	40
Client References	10
TOTAL	100

(b) Qualification, Registration and Experience of key personnel (50 points):

Points are allocated for professional qualifications, professional registration and experience of allocated key personnel for the panel under consideration. For each key personnel allocated to the project, the bidder shall submit the following: Curriculum Vitae together with certified proof of qualifications and professional registration.

(c) Company's experience in managing building projects (40 points):

Points are allocated for the bidding entity's experience in managing major building projects **completed** (not currently running) in the past 15 years. The experience refers to major projects managed by the entity which are largely comprised of renovation or refurbishment works and construction which have the complexity and value in accordance with the estimated construction cost for this project.

To score points for the above, bidders are required to submit the following:

1. Letters of appointments for projects listed under the "Project Experience" returnable schedule.
2. Confirmation of project completion by the Client for projects listed under the "Project Experience" returnable schedule.

NB: Non-submission of any of the above-mentioned documents confirming bidder's experience will result in the bidder not scoring any points

(d) Client References on company's experience in managing major Refurbishment of buildings (10 points):

Points are allocated for performance of the bidders on previous projects completed. Client Reference Scorecards" shall be submitted for scoring (see returnable attached).

NB: For Client Reference, MUST ONLY use the Evaluation Schedule provided by IDT (see attached page 31, 32, 33)

Evaluation points will be awarded in terms of the following tables:

10.1.2 Evaluation Criteria for PM

Qualifications of Proposed Resources (50 Points)

10.1.2.1 - Evaluation sub-criteria: Qualifications of proposed resources (10 points)		
Name of Staff Member	Qualification (10 points)	
	Diploma	Degree
1. Accountable professional: Director / Manager	2.5	5
2. Responsible Professional: Project Leader	2.5	5
Subtotal number of points	5	10

Professional Registration of Proposed Resources

10.2.2.2 - Evaluation sub-criteria: Professional Registration of proposed resources (24 points)		
Name of Staff Member	Professional Registration	
	None	Pr. CPM
1. Accountable professional; Director/Manager	0	12
2. Responsible Professional; Project Leader	0	12
Subtotal number of points	0	24

Experience of Proposed Resources

10.1.2.3 – Evaluation sub-criteria: Experience of proposed key personnel (16 points)			
Name of Proposed Personnel	Experience of proposed key personnel, post professional registration (16 points)		
	Less than 5 Years	5 - 10 Years	Over 10 Years
1. Accountable Professional; Director/Manager	2.5	5	8
2. Responsible Professional; Project Leader	2.5	5	8
Subtotal number of points	5	10	16

Company experience in managing building projects (40 points)

Project	Projects less than R1 million	Projects between R1 – R3 million	Projects between R3 – R5 million	Projects over R5 million
Project 1	0	5	9	13.34
Project 2	0	5	9	13.33
Project 3	0	5	9	13.33
Sub-total number of points	0	15	27	40

Client References on company's experience in managing building projects (10 points):

Evaluation sub-criteria: Client's Reference (10 points)				
Projects	Overall assessment by Client			
	Poor	Fair	Good	Excellent
Project 1	0	1	2	3.34
Project 2	0	1	2	3.33
Project 3	0	1	2	3.33
Total number of points	0	3	6	10

10.1.3 Evaluation Criteria for Architect and Quantity Surveyors

Qualifications of Proposed Resources (50 Points)

10.1.3.1 - Evaluation sub-criteria: Qualifications of proposed resources (10 points)		
Name of Staff Member	Qualification (10 points)	
	Diploma	Degree

1. Accountable professional: Director / Manager	2.5	5
2. Responsible Professional: Project Leader	2.5	5
Subtotal number of points	5	10

Professional Registration of Proposed Resources

10.2.3.2 - Evaluation sub-criteria: Professional Registration of proposed resources (24 points)		
Name of Staff Member	Professional Registration	
	*Pr. Technologist Arch / QS	Pr. Arch / QS
1. Accountable professional; Director/Manager	*6	12
2. Responsible Professional; Project Leader	*6	12
Subtotal number of points	12	24

**Note: limitations in terms of registration as per council where applicable*

Experience of Proposed Resources

10.1.3.3 – Evaluation sub-criteria: Experience of proposed key personnel (16 points)			
Name of Proposed Personnel	Experience of proposed key personnel, post professional registration (16 points)		
	Less than 5 Years	5 - 10 Years	Over 10 Years
1. Accountable Professional; Director/Manager	2.5	5	8
2. Responsible Professional; Project Leader	2.5	5	8
Subtotal number of points	5	10	16

Company experience in managing building projects (40 points)

Project	Projects less than R1 million	Projects between R1 – R3 million	Projects between R3 – R5 million	Projects over R5 million
Project 1	0	5	9	13.34
Project 2	0	5	9	13.33
Project 3	0	5	9	13.33
Sub-total number of points	0	15	27	40

Client References on company's experience in managing building projects (10 points):

Evaluation sub-criteria: Client's Reference (10 points)				
Projects	Overall assessment by Client			
	Poor	Fair	Good	Excellent
Project 1	0	1	2	3.34
Project 2	0	1	2	3.33
Project 3	0	1	2	3.33
Total number of points	0	3	6	10

10.1.4 Evaluation Criteria for Engineers

Qualifications of Proposed Resources (50 Points)

10.1.4.1 - Evaluation sub-criteria: Qualifications of proposed resources (10 points)		
Name of Staff Member	Qualification (10 points)	
	Diploma	Degree
1. Accountable professional: Director / Manager	2.5	5
2. Responsible Professional: Project Leader	2.5	5
Subtotal number of points	5	10

Professional Registration of Proposed Resources

10.2.4.2 - Evaluation sub-criteria: Professional Registration of proposed resources (24 points)		
Name of Staff Member	Professional Registration	
	*Pr. Technologist	Pr. Eng
1. Accountable professional; Director/Manager	*6	12
2. Responsible Professional; Project Leader	*6	12
Subtotal number of points	12	24

**Note: limitations in terms of registration as per council where applicable*

Experience of Proposed Resources

10.1.4.3 – Evaluation sub-criteria: Experience of proposed key personnel (16 points)			
Name of Proposed Personnel	Experience of proposed key personnel, post professional registration (16 points)		
	Less than 5 Years	5 - 10 Years	Over 10 Years

1. Accountable Professional; Director/Manager	2.5	5	8
2.Responsible Professional; Project Leader	2.5	5	8
Subtotal number of points	5	10	16

Company experience in managing major building projects (40 points)

Project	Projects less than R1 million	Projects between R1 – R3 million	Projects between R3 – R5 million	Projects over R5 million
Project 1	0	5	9	13.34
Project 2	0	5	9	13.33
Project 3	0	5	9	13.33
Sub-total number of points	0	15	27	40

Client References on company's experience in managing building projects (10 points):

Evaluation sub-criteria: Client's Reference (10 points)				
Projects	Overall assessment by Client			
	Poor	Fair	Good	Excellent
Project 1	0	1	2	3.34
Project 2	0	1	2	3.33
Project 3	0	1	2	3.33
Total number of points	0	3	6	10

10.1 STAGE 2 – Price and B-BBEE Evaluation (Not Applicable for this bid)

- (i) The stage 2 is not applicable for this bid
- (ii) When pricing proposals / RFQs are called for, bidders that will be invited to bid in line with the IDT's panel policy will be required to submit an original or certified consolidated B-BBEE certificate from a SANAS accredited verification agency in order to qualify for points for the B-BBEE status level as one entity. Sworn Affidavits for EMEs and QSEs must be originals, no copies of affidavits will be accepted for claiming B-BBEE points.

10.2 General Condition

- (i) The tender shall be valid for **90** days.
- (ii) No late, bids, copies, e-mailed or faxed documents will be considered.
- (iii) Bids must be submitted by no later than **12h00** on Friday **25 March 2025**. Any bid documents received after closing date and time will not be considered.
- (iv) Bids to be submitted on weekdays between 8h00 am and 16h00 pm

10.3 DISCLAIMER

- (i) IDT reserves the right to cancel or withdraw this expression of interest without prior notice and without furnishing any reasons whatsoever.
- (ii) Should the bid be cancelled by the IDT, for any reasons, the IDT shall not be liable to remunerate the service provider for any potential loss of business and any cost/s incurred in relation to bid.

INVITATION TO BID

SBD 1

YOU ARE HEREBY INVITED TO BID FOR THE PSP PANEL FOR A 3 YEAR PERIOD

BID NUMBER: **IDTNC-PANEL-2025/6 -2028/9** CLOSING DATE: **25 March 2025** CLOSING TIME: **12:00**

REQUEST FOR PROPOSALS FROM QUALIFYING AND EXPERIENCED ENTITIES FOR PROVISION OF PROFESSIONAL SERVICES FOR A PANEL OF SERVICE PROVIDERS FOR A PERIOD OF 3 YEARS

The successful bidder will be required to fill in and sign a written Contract Form

BID DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT *IDT OFFICES, BLOCK D SANLAM OFFICE PARK, 13 BISHOPS AVENUE, LABRAM, KIMBERLY, 8301*

The IDT Bid Box at The Independent Development Trust, BLOCK D SANLAM OFFICE PARK, 13 BISHOPS AVENUE, LABRAM, KIMBERLY, 8301

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

The bid box is open from 8:00am to 16:00, 5 days a week, (i.e Monday to Friday or normal working days)

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

EMAIL ADDRESS

FACSIMILE NUMBER CODENUMBER.....

VAT REGISTRATION NUMBER.....

HAS A COPY OF A TAX CLEARANCE CERTIFICATE **WITH A TAX COMPLIANT PIN** BEEN SUBMITTED YES / NO

ARE YOU THE ACCREDITED REPRESENTATIVE

IN SOUTH AFRICA FOR THE GOODS/SERVICES OFFERED BY YOU? YES /NO (IF YES ENCLOSE PROOF)

ARE YOU SUBMITTING THIS TENDER BID AS A JOINT VENTURE WITH ANOTHER COMPANY YES /NO

IF YES, PLEASE PROVIDE NAME OF THE OTHER JOINT VENTURE _____

SIGNATURE OF BIDDER

DATE

CAPACITY UNDER WHICH THIS BID IS SIGNED

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

SBD 4

DECLARATION OF INTEREST

1. 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 favoritism, 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/a person who are/is 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.
2. **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**
 - 2.1 Full Name of bidder or his or her representative:.....
 - 2.2 Identity Number:.....
 - 2.3 Position occupied in the Company (director, trustee, shareholder², member):
.....
 - 2.4 Registration number of company, enterprise, close corporation, partnership agreement or trust:

2.5
Tax Reference Number:

2.6 VAT Registration Number:

2.6.1 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 paragraph 3 below.

¹"State" means –

(a) any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);

(b) any municipality or municipal entity;

(c) provincial legislature;

(d) national Assembly or the national Council of provinces; or

(e) Parliament.

²"Shareholder" means a person who owns shares in the company and is actively involved in the management of the enterprise or business and exercises control over the enterprise.

2.7 Are you or any person connected with the bidder **YES / NO**
presently employed by the state?

2.7.1 If so, furnish the following particulars:

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:

.....

.....

.....

2.7.2 If you are presently employed by the state, did you obtain **YES / NO**
the appropriate authority to undertake remunerative
work outside employment in the public sector?

2.7.2.1 If yes, did you attach proof of such authority to the bid document?

YES / NO

(Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the bid.

2.7.2.2 If no, furnish reasons for non-submission of such proof:

.....
.....
.....

2.8 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?

YES / NO

2.8.1 If so, furnish particulars:

.....
.....
.....

2.9 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?

YES / NO

2.9.1 If so, furnish particulars.

.....
.....
.....

2.10 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?

YES/NO

2.10.1 If so, furnish particulars.

.....
.....
.....

2.11 Do you or any of the directors / trustees / shareholders / members **YES/NO**
of the company have any interest in any other related companies
whether or not they are bidding for this contract?

2.11.1 If so, furnish particulars:

.....
.....
.....

3 Full details of directors / trustees / members / shareholders.

Full Name	Identity Number	Personal Tax Number	Income Reference	State Number Number	Employee / Persal Number

4 DECLARATION

I, THE UNDERSIGNED (NAME).....

CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME 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.

- i) **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**
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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
- 1.2 **To be completed by the organ of state**
(delete whichever is not applicable for this tender).
- a) The applicable preference point system for this tender is the 80/20 preference point system.
- b) 80/20 preference point system will be applicable in this tender. The lowest/highest acceptable tender will be used to determine the accurate system once tenders are received.
- 1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:
- (a) Price; and
 - (b) Specific Goals.

1.4 **To be completed by the organ of state:**

The maximum points for this tender are allocated as follows:

	POINTS	
PRICE	90	80
SPECIFIC GOALS	10	20
TARGETED GROUP		
Women	3	6
Youth	3	6
People with Disabilities	2	4
Black Male	2	4
Total points for Price and SPECIFIC GOALS	100	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.

1. 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).

1. 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

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

Where

P_s = Points scored for price of tender under consideration

P_t = Price of tender under consideration

P_{min} = 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:

80/20

or

90/10

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

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmax = Price of highest acceptable tender

2. 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)
Women	3	6		
Youth	3	6		
People with Disabilities	2	4		
Black Male	2	4		

Source Documents to be submitted with the Bid or RFQ

- *CIPC Document (Company Registration Document will be required for verification (CIPC DOC))
- *Woman (Originally Certified ID Document)
- *Youth (Originally Certified ID Document)
- *People with Disability (Letter from the Dr. Confirming the Disability)
- *Black Ownership (Originally Certified ID Document)

ii) **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:

iii) The information furnished is true and correct;

iv) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;

v) 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;

vi) 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:

DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

- 1 This Standard Bidding Document must form part of all bids invited.
- 2 It serves as a declaration to be used by institutions in ensuring that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system.
- 3 The bid of any bidder may be disregarded if that bidder, or any of its directors have-
 - a. abused the institution's supply chain management system;
 - b. committed fraud or any other improper conduct in relation to such system; or
 - c. failed to perform on any previous contract.
- 4 **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**

Item	Question	Yes	No
4.1	Is the bidder or any of its directors listed on the National Treasury's database as companies or persons prohibited from doing business with the public sector? (Companies or persons who are listed on this database were informed in writing of this restriction by the National Treasury after the <i>audialterampartem</i> rule was applied).	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.1.1	If so, furnish particulars:		
4.2	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)? To access this Register enter the National Treasury's website, www.treasury.gov.za, click on the icon "Register for Tender Defaulters" or submit your written request for a hard copy of the Register to facsimile number (012) 3265445.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.2.1	If so, furnish particulars:		

4.3	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?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.3.1	If so, furnish particulars:		
4.4	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?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.4.1	If so, furnish particulars:		

CERTIFICATION

I, THE UNDERSIGNED (FULL NAME).....

CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM IS TRUE AND CORRECT.

I ACCEPT THAT, IN ADDITION TO CANCELLATION OF A CONTRACT, ACTION MAY BE TAKEN AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....

Signature

.....

Position

.....

Date

.....

Name of Bidder

CERTIFICATE OF INDEPENDENT BID DETERMINATION

- 1 This Standard Bidding Document (SBD) must form part of all bids¹ invited.
- 2 Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by, firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging).² Collusive bidding is a *pe se* prohibition meaning that it cannot be justified under any grounds.
- 3 Treasury Regulation 16A9 prescribes that accounting officers and accounting authorities must take all reasonable steps to prevent abuse of the supply chain management system and authorizes accounting officers and accounting authorities to:
 - a. disregard the bid of any bidder if that bidder, or any of its directors have abused the institution's supply chain management system and or committed fraud or any other improper conduct in relation to such system.
 - b. cancel a contract awarded to a supplier of goods and services if the supplier committed any corrupt or fraudulent act during the bidding process or the execution of that contract.
- 4 This SBD serves as a certificate of declaration that would be used by institutions to ensure that, when bids are considered, reasonable steps are taken to prevent any form of bid-rigging.

5 In order to give effect to the above, the attached Certificate of Bid Determination (SBD 9) must be completed and submitted with the bid:

¹ Includes price quotations, advertised competitive bids, limited bids and proposals.

² Bid rigging (or collusive bidding) occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and / or services for purchasers who wish to acquire goods and / or services through a bidding process. Bid rigging is, therefore, an agreement between competitors not to compete.

SBD 9

CERTIFICATE OF INDEPENDENT BID DETERMINATION

I, the undersigned, in submitting the accompanying bid:

(Bid Number and Description)

in response to the invitation for the bid made by:

(Name of Institution)

do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of _____ that:

(Name of Bidder)

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;

3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign the bid, on behalf of the bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:
 - (a) has been requested to submit a bid in response to this bid invitation;
 - (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
 - (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder
6. 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.
7. In particular, without limiting the generality of paragraphs 6 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.
8. 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.
9. 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 **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.**

10. 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.

.....

Signature

.....

Position

.....

Date

.....

EVALUATION SCHEDULE: CLIENT REFERENCES

The Tenderer shall provide details of his performance on each of the previous projects listed in the “Relevant Experience” returnable schedule. “Client Reference Scorecards” will be completed by each of the respective Clients for the projects listed in the “Relevant Experience” returnable schedule. Uncompleted and Unsigned forms by the client will score zero points. Bidders to use the form supplied on tender document (different form will not be accepted)

The following are to be **completed by the Client**

PROJECT 1:

Name of Project:.....

Name of Firm/Bidder:.....

Client/Client Department:

Contract Amount:.....

Contract Duration:

Actual Contract Duration:

Description / Performance	Poor (0)	Fair (1)	Good (3)	Excellent (4.34)
Cost management				
Timeous compilation of final account/as-built				
Timeous co-operation during the contract				
Quality of service				
Quality of reports				
Performance of resources				
Technical experience of resources				

Any other remarks considered necessary to assist in evaluation of the Tenderer?

Name of Client Representative:

Designation:

Telephone:

Client Signature: **Date:**

Stamp

EVALUATION SCHEDULE: CLIENT REFERENCES

The Tenderer shall provide details of his performance on each of the previous projects listed in the “Relevant Experience” returnable schedule. “Client Reference Scorecards” will be completed by each of the respective Clients for the projects listed in the “Relevant Experience” returnable schedule. Uncompleted and Unsigned forms by the client will score zero points. Bidders to use the form supplied on tender document (different form will not be accepted)

The following are to be **completed by the Client**

PROJECT 2:

Name of Project:.....

Name of Firm/Bidder:.....

Client/Client Department:

Contract Amount:.....

Contract Duration:

Actual Contract Duration:

Description / Performance	Poor (0)	Fair (1)	Good (3)	Excellent (4.34)
Cost management				
Timeous compilation of final account/as-built				
Timeous co-operation during the contract				
Quality of service				
Quality of reports				
Performance of resources				
Technical experience of resources				

Any other remarks considered necessary to assist in evaluation of the Tenderer?

Name of Client Representative:

Designation:

Telephone:

Client Signature: **Date:**

Stamp

EVALUATION SCHEDULE: CLIENT REFERENCES

The Tenderer shall provide details of his performance on each of the previous projects listed in the “Relevant Experience” returnable schedule. “Client Reference Scorecards” will be completed by each of the respective Clients for the projects listed in the “Relevant Experience” returnable schedule. Uncompleted and Unsigned forms by the client will score zero points. Bidders to use the form supplied on tender document (different form will not be accepted)

The following are to be **completed by the Client**

PROJECT 3:

Name of Project:.....

Name of Firm/Bidder:.....

Client/Client Department:

Contract Amount:.....

Contract Duration:

Actual Contract Duration:

Description / Performance	Poor (0)	Fair (1)	Good (3)	Excellent (4.33)
Cost management				
Timeous compilation of final account/as-built				
Timeous co-operation during the contract				
Quality of service				
Quality of reports				
Performance of resources				
Technical experience of resources				

Any other remarks considered necessary to assist in evaluation of the Tenderer?

Name of Client Representative:

Designation:

Telephone:

Client Signature:

Date:

Stamp

EVALUATION SCHEDULE: CLIENT REFERENCES

The Tenderer shall provide details of his performance on each of the previous projects listed in the “Relevant Experience” returnable schedule. “Client Reference Scorecards” will be completed by each of the respective Clients for the projects listed in the “Relevant Experience” returnable schedule. Uncompleted and Unsigned forms by the client will score zero points. Bidders to use the form supplied on tender document (different form will not be accepted)

The following are to be **completed by the Client**

PROJECT 4:

Name of Project:.....

Name of Firm/Bidder:.....

Client/Client Department:

Contract Amount:.....

Contract Duration:

Actual Contract Duration:

Description / Performance	Poor (0)	Fair (1)	Good (3)	Excellent (4.33)
Cost management				
Timeous compilation of final account/as-built				
Timeous co-operation during the contract				
Quality of service				
Quality of reports				
Performance of resources				
Technical experience of resources				

Any other remarks considered necessary to assist in evaluation of the Tenderer?

Name of Client Representative:

Designation:

Telephone:

Client Signature: **Date:**

Stamp

EVALUATION SCHEDULE: CLIENT REFERENCES

The Tenderer shall provide details of his performance on each of the previous projects listed in the “Relevant Experience” returnable schedule. “Client Reference Scorecards” will be completed by each of the respective Clients for the projects listed in the “Relevant Experience” returnable schedule. Uncompleted and Unsigned forms by the client will score zero points. Bidders to use the form supplied on tender document (different form will not be accepted)

The following are to be **completed by the Client**

PROJECT 5:

Name of Project:.....

Name of Firm/Bidder:.....

Client/Client Department:

Contract Amount:.....

Contract Duration:

Actual Contract Duration:

Description / Performance	Poor (0)	Fair (1)	Good (3)	Excellent (4.33)
Cost management				
Timeous compilation of final account/as-built				
Timeous co-operation during the contract				
Quality of service				
Quality of reports				
Performance of resources				
Technical experience of resources				

Any other remarks considered necessary to assist in evaluation of the Tenderer?

Name of Client Representative:

Designation:

Telephone:

Client Signature: **Date:**

Stamp

Returnable Documents

List of returnable documents are for ensuring that everything the employer requires a tenderer to submit with his tender is included in, or returned with, his tender submission. Tick below if returnable document is attached or completed properly.

#	LIST OF RETURNABLE DOCUMENTS	TICK IF ATTACHED
1	Professional Registration of the Director	
2	Proof of company physical address	
3	Proof of CSD registration	
4	B-BBEE Certificate	
5	Valid Vat Certificate	
6	Tax Clearance Certificate with PIN	
7	Joint Venture Agreement Between Parties (If Applicable)	
8	Parties Cancelled Cheque or Original Letter From Bank	
9	Letter from the Bank Stating All Signatories	
10	Certified copies Identity Documents	
11	Contractor's Copy of Registration of Incorporation or Company Registration Documents	
12	Copy of a Letter of Goodstanding with Compansation For Occupational And Injuries Dieses Act (COIDA) Registration Certificate	
13	Compulsory Enterprise Questionnaire	
14	SBD Forms (SBD 1; 4; 6.1; 8; 9)	
15	Certificate of Attendance At Compulsory Briefing if applicable	
16	Certificate of Authority for Signatory	
17	Record of Addenda to the tender documents if applicable	
18	Tenderer's Financial Standing if applicable	
19	Amendments, Qualifications And Alternatives	
20	Socio Economic Upliftment Strategy if applicable	
21	Health And Safety Declaration if applicable	
22	Safety Health Environmental And Quality Management System (SHEQ) Plan if applicable	

#	LIST OF RETURNABLE DOCUMENTS	TICK IF ATTACHED
23	Project Experience	
24	Letters of Appointment, and Relevant Completion Certificates (Practical Completion, Work Completion & Final Completion)	
25	Client References	
26	Key Personnel	
27	Preliminary Programme Schedule if applicable	
28	Project Methodology if applicable	
29	Locality if applicable	