

INVITATION TO BID

REQUEST FOR BID DESCRIPTION:

APPOINTMENT OF CIDB REGISTERED CONTRACTOR- GENERAL BUILDING FOR THE REFURBISHMENT OF ERASMUS CASTLE

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NOTE:

Kindly register on the National Treasury's Central Supplier Database (CSD) via www.csd.gov.za

Bids must ONLY be submitted in hard copy; electronic bid submissions are NOT acceptable.

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RETURNABLE DOCUMENTS CHECKLIST

Bidders are required to develop a returnable schedule annexure in accordance with the following table of contents

	List of documents required.	Submitted [Yes or No]	
1.	Central Supplier database (CSD) registration report or Unique Registration Reference Number	Yes <input type="checkbox"/>	No <input type="checkbox"/>
2.	Valid Tax Clearance Certificate (s) and or proof of application endorsed by SARS and / or SARS issued verification pin code.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
3.	Copies of bidders CIPC Company registration documents listing all members with percentage, See bidding structure for required documents.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.	Copy of the Joint Venture / Consortium Agreement duly signed by all parties	Yes <input type="checkbox"/>	No <input type="checkbox"/>
5.	Copy of the Sub-Contracting Agreement duly signed by all parties	Yes <input type="checkbox"/>	No <input type="checkbox"/>
6.	Valid proof of BBBEE status for the bidder and its sub-contractor(s)	Yes <input type="checkbox"/>	No <input type="checkbox"/>
7.	Designated sectors: Local production and content. (Where applicable)	Yes <input type="checkbox"/>	No <input type="checkbox"/>
8.	Originally certified copy of Identity Document for the Company representative	Yes <input type="checkbox"/>	No <input type="checkbox"/>
9.	Copy of latest audited financial statements	Yes <input type="checkbox"/>	No <input type="checkbox"/>
10.	Bid conditions acceptance form on KD17 (Mandatory)	Yes <input type="checkbox"/>	No <input type="checkbox"/>

**ARMAMENTS CORPORATION OF SOUTH AFRICA SOC LTD
(ARMSCOR)**

Company registration: 1968/008611/06 Vat registration: 4500101169

REQUEST FOR BID: EFAC/2023/12

1. INSTRUCTIONS ON SUBMISSION OF BIDS

- 1.1 Bid Closing at **11:00 am on 02 October 2023 (SOUTH AFRICAN TIME)**
- 1.2 Bids must be submitted in a sealed envelope marked with this bid reference number.
- 1.3 The sealed envelope must be deposited in the bid box at Armscor Head Office, Visitors Entrance (Block) 8 before the bid closing date and time addressed to:

The Manager:	Supply Chain Management Department Armscor SOC Ltd
Postal address:	Armscor SOC Ltd Private Bag X337 Pretoria 0001
Delivery address:	Armscor Head Office 370 Nossob Street Erasmuskloof Ext 4 Pretoria
- 1.4 Bids dispatched by the courier service Company must be marked with bid reference number on the delivery note / packaging and the courier must ensure that the bid document is deposited in the bid box before the closing date and time. **Armscor will not be held responsible for any delays where bid documents are handed to the Armscor Reception.**
- 1.5 Bid proposals received after the closing time and date will not be considered.

2. ENQUIRIES

- 2.1 All queries regarding this bid must be addressed in writing to SCM Department on aopts@armscor.co.za. Questions/enquiries relating to this RFB should be received three working days prior to the closing date. Queries received after this period will not be entertained.

3. BID VALIDITY PERIOD

Bid proposals to remain valid for acceptance for a period of **ONE HUNDRED AND TWENTY** days counted from the closing date.

NOTE: Bids for the supply of the goods and/or services described in the attached documents are invited in accordance with the provisions of the General Conditions of Contract (A-STD-0020) Issue 5 dated 22 June 2022 as well as any special condition contained in these documents. Copies of the General Conditions of Contract and the Rules of Procedure are available on Armscor's website at www.armscor.co.za.

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BIDDING STRUCTURE

Indicate the type of bidding structure by marking with an 'X' in an appropriate box.	
Individual Bidder	
Joint Venture	
Consortium	
Using Sub-contractors	
Other	

Only fill the relevant category:

If individual bidder, indicate the following:	
Name of Bidder	
Company / Close Corporation Registration Number	
VAT Registration Number	
National Treasury Supplier Number	
Unique Registration Reference Number	
Contact Person	
Telephone Number	
Fax Number	
Email Address	
Postal Address	
Physical Address	
NB: Submit with the bid the following documents:	
Copies of the bidder's CIPC company registration documents listing all members with percentages, in case of a CC.	
In case of Individual Bidder supply ID document for local and if foreigner supply passport number or identification as applicable in that country	
Latest copies of all share certificates, in case of a company or any other form of a legal entity.	
Shareholding breakdown per race, gender and percentage shareholding with shareholders of the bidding entity.	

If Joint Venture or Consortium, indicate the following: (To be completed for each JV/Consortium member)

Name of Joint Venture / Consortium	
Company / Close Corporation Registration Number	
VAT Registration Number	
National Treasury Supplier Number	
Unique Registration Reference Number	
Contact Person	
Telephone Number	
Fax Number	
Email Address	
Postal Address	
Physical Address	

NB: Submit with the bid the following documents:

Copies of the bidder's CIPC company registration documents listing all members with percentages, in case of a CC.

In case of Individual Bidder supply ID document for local and if foreigner supply passport number or identification as applicable in that country

Latest copies of all share certificates, in case of a company or any other form of a legal entity.

Shareholding breakdown per race, gender and percentage shareholding with shareholders of the bidding entity.

If Joint Venture or Consortium, indicate the following:

Name of Prime Contractor	
Company / Close Corporation Registration Number	
VAT Registration Number	
National Treasury Supplier Number	
Unique Registration Reference Number	
Contact Person	
Telephone Number	
Fax Number	
Email Address	
Postal Address	
Physical Address	

NB: Submit with the bid the following documents:

Copies of the bidder's CIPC company registration documents listing all members with percentages, in case of a CC.

In case of Individual Bidder supply ID document for local and if foreigner supply passport number or identification as applicable in that country

Latest copies of all share certificates, in case of a company or any other form of a legal entity.

Shareholding breakdown per race, gender and percentage shareholding with shareholders of the bidding entity.

If using subcontractors, indicate the following:

Name of Prime -Contractor	
Percentage Value to be subcontracted	
Company / Close Corporation Registration Number	
VAT Registration Number	
National Treasury Supplier Number	
Unique Registration Reference Number	
Contact Person	
Telephone Number	
Fax Number	
Email Address	
Postal Address	
Physical Address	

Subcontractor Details:

Name of Subcontractor	
Company / Close Corporation Registration Number	
VAT Registration Number	
National Treasury Supplier Number	
Unique Registration Reference Number	
Contact Person	
Telephone Number	
Fax Number	
Email Address	
Postal Address	
Physical Address	

NB: Submit with the bid the following documents for both Prime and Sub-Contractors:

Copies of the bidder's CIPC company registration documents listing all members with percentages, in case of a CC.

In case of Individual Bidder supply ID document for local and if foreigner supply passport number or identification as applicable in that country

Latest copies of all share certificates, in case of a company or any other form of a legal entity.

Shareholding breakdown per race, gender and percentage shareholding with shareholders of the bidding entity.

Other:	
Name of Bidder	
Company / Close Corporation Registration Number	
VAT Registration Number	
National Treasury Supplier Number	
Unique Registration Reference Number	
Contact Person	
Telephone Number	
Fax Number	
Email Address	
Postal Address	
Physical Address	
NB: Submit with the bid the following documents:	
Copies of the bidder's CIPC company registration documents listing all members with percentages, in case of a CC.	
In case of Individual Bidder supply ID document for local and if foreigner supply passport number or identification as applicable in that country	
Latest copies of all share certificates, in case of a company or any other form of a legal entity.	
Shareholding breakdown per race, gender and percentage shareholding with shareholders of the bidding entity.	

Declaration:

I, as the duly authorized representative of the bidder hereby authorize Armscor to request, investigate and process company information including tax compliance via the SARS website.

.....
Name.....
ID number

BID CONDITIONS ACCEPTANCE FORM**Bidders shall complete and sign this bid conditions acceptance form**

I/We hereby offer to supply all or some of the supplies and/or services described in the Pricing Schedule and /or attached documents on the terms and conditions and in accordance with the A-STD-0020 Issue 5 dated 22 June 2022 (and I/we acknowledge that I/we am/are acquainted therewith) at the price and on the terms of delivery/execution inserted by me/us.

I/We agree -

1. that this bid shall remain binding on me/us and open for acceptance for the period stipulated above;
2. that if my/our bids is accepted, the acceptance will be communicated to me/us by letter or order through the post, and such acceptance shall constitute a contract between me/us and Armscor, subject to the terms and conditions set out in Armscor's General Conditions of Contract (A-STD-0020), Issue 5 dated 22 June 2022, the contents of which I/we acknowledge ourselves to be acquainted with.

I/We choose as domicilium citandi et executandi in the Republic

.....

.....

(no post box or private bag)

IN BLOCK LETTERS ON BEHALF OF -

Complete registered:

Name of bidder:.....

AUTHORISED SIGNATURE

..... Date:

Name in block letters:

Capacity:

NB: FAILURE TO COMPLETE AND SIGN THIS PAGE SHALL INVALIDATE THE BID AND WILL BE DISQUALIFIED FROM FURTHER EVALUATION.

SUPPLIER REGISTRATION

- 1.1 Bidders must register on the National Treasury Central Supplier Database (CSD) in terms of National Treasury Instruction Note 3 of 2016/17.
- 1.2 Bidders must electronically register for Security on Armscor website to be considered for orders which are administered by Armscor SOC Ltd on Behalf of clients.

For more information on security registration contact:-
The Security Registration
Private Bag X337
PRETORIA
0001

E-mail:- register@armscor.co.za

ALL BIDDERS SHALL COMPLY WITH THE FOLLOWING:

1. Bidders should check the numbers of the pages correspond with the table of contents as no liability arising from claims owing to the omission or duplication of pages will be recognised by Armscor. The appendices mentioned in these pages form part of the bids.
2. **All bidders shall -**
 - 2.1. insert their name at the top of each price schedule form used (a rubber stamp may be used);
 - 2.2. insert the information in the spaces provided in the price schedules by writing or typing on the dotted lines only (additional information should be contained in a separate annexure);
 - 2.3. if they wish to make more than one bid against an item, as an alternative, apply for additional copies of the bid documents or photocopy one or more pages, and not retype or redraft any of the forms used;
 - 2.4. indicate the prices quoted in the units shown and quote them per item;
 - 2.5. indicate in respect of each item whether the goods/services quoted comply strictly with the specified requirements, and furnish particulars of deviations if this is not so;
 - 2.6. complete all appendices.
3. **Value-added tax, customs duties, *ad valorem* customs duties and surcharges:**
 - 3.1. Value added tax levied by the Receiver of Revenue must not be included in the prices quoted but be shown as a separate line item.
 - 3.2. Where supplies are quoted which are subject to levying of any customs duty, *ad valorem* customs or excise duty or surcharge by the Department of Customs and Excise, such charges must not be included by the bidder in the prices quoted. The applicable customs duty, *ad valorem* customs or excise duty or surcharge must, however, be indicated separately where provided for on Armscor's Questionnaire
4. **Security:**
 - 4.1. Classified bids are to be handled in the manner set out in Armscor's Security Instruction, document number A-WI-014, copies of which are obtainable on request from the Contractor Security Section, P O Box 411, Pretoria, 0001.
 - 4.2. Attention is drawn particularly to the procedure set out in chapter 4 of the manual, which is to be complied with when forwarding classified documents.

5. Advance payments:

Bidders shall furnish the price without advance payment.

6. Performance Guarantee:

Armscor reserves the right to request the successful bidder to submit a performance guarantee for the proposed contract. Bidders must submit prices without provision for the performance guarantee as well as prices including the cost of such a guarantee.

7. Commissions:

If any commission is payable by yourself to any person(s) or body as a result of any order which may arise from this Request for Proposal, you must submit full details of the applicable person(s) or body and the amount payable, with this bid.

8. Tax Compliance Requirements

It is a condition of bid that the successful bidder MUST be tax compliant, or that satisfactory arrangements have been made with the South African Revenue Service (SARS) to meet the bidder's tax obligations. FOREIGN COMPANIES ARE REQUIRED TO COMPLETE QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS OF ANNEXURE 1 TO KD 25

- 8.1 In order to meet this requirement the bidder is required to access SARS e-filing and complete the SARS ONLINE "SARS tax compliance status" under tax status. Tax compliance requirements are also applicable to individuals who wish to submit bids.
- 8.2 SARS will then furnish the bidder with a Tax compliance PIN code that will be valid for a period of 1 (one) year from the date of approval.
- 8.3 The Tax compliance PIN letter shall be submitted with the bid, with an authorisation letter for Armscor to use the PIN code for verification of tax compliance status of the supplier.
- 8.4 In bids where Consortia /Joint Ventures / are involved, each party must submit a separate tax compliance PIN with authorisation letter.
- 9.5 In the event of subcontracting, tax compliance PIN letter and authorisation letter for the subcontractor must also be submitted with the bid.

8.6 Tax compliance is done via e-filing on the SARS website www.sars.gov.za.

NOTE: Armscor Suppliers /Bidders and Subcontractors must remain tax compliant for the duration of their contracts.

9. Tax Compliance

The conditions detailed in the Instruction for Application for Tax Compliance (KD 25) must be adhered to. Armscor Suppliers /Bidders must remain tax compliant for the duration of their contracts.

10. Defence Industrial Participation and National Industrial Participation

10.1 The DIP value threshold of foreign content is based on:

Any single agreement of which the foreign content exceeds USD 2 million; Multiple main agreements concluded within two years of each other, within the framework of a specific project or across different projects, for same and or similar products or services, awarded to the same Seller of which the aggregate value of the foreign content exceeds USD 2 million; Extensions or amendments to the main agreement within the active life of the agreement, which result in the aggregate foreign content value of the project exceeding USD 2 million; Where multiple suppliers are used to address a single Defence Acquisition for the same products or services and the value of the foreign content, in total, exceeds USD 2 million, each supplier shall incur pro rata 50% of the total DIP obligation.

10.2 Where a contract to the value of the equivalent of USD10 000 000 or more, is placed on a foreign company, a minimum of 30 % National Industrial Participation (NIP) shall be part of the foreign company's contractual obligations, in addition to the 50 % DIP. This condition is also applicable to all contracts placed on a local company, subcontracting a single foreign company to the aforesaid value or more.

11. Mandatory local production and content for designated sectors

11.1 A person awarded a contract in relation to a designated sector, may not sub-contract in such a manner that the local production and content of the overall value of the contract is reduced to below the stipulated minimum threshold.

11.2 If there is no designated sector, Armscor will include as a specific condition of the bid, that only locally produced services or goods or locally manufactured goods with a stipulated minimum threshold for local production and content, will be considered.

12. Awarding of Bids

The awarding of bids will be in terms of the Preferential Procurement Policy Framework Act, 2000: Preferential Procurement Regulations, 2022 and Armscor Preference Point System of the Preferential Procurement Regulations, 2022.

The applicable points are:

Price: (Pp)	80 Points
Specific Goals	20 Points
Total:	100 Points

The following formula will be used to calculate the points in respect of a bid up to a rand value of R50 000 000, 00 (all applicable taxes included).

(Armscor may also apply this formula to price quotations with a value of less than R30 000, if and when appropriate):

A maximum of 80 or 90 points is allocated for price on the following basis:

80/20

$$Ps = 80 \left(1 - \frac{Pt - Pmin}{Pmin} \right)$$

Where

Ps = Points scored for price of bid under consideration

Pt = Price of bid under consideration

Pmin = Price of lowest acceptable bid

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KD17

BID NUMBER : EFAC 2023/12

CLOSING AT 11:00 ON : 02 October 2023

VALIDITY PERIOD: 120 DAYS

NAME OF BIDDER : _____

ITEM NO	DESCRIPTION	QTY	UNIT PRICE IN FOREIGN CURRENCY	UNIT PRICE IN S.A. CURRENCY	SUBTOTAL
	Renovation of Erasmus Castle as per Statement of Work and the Bill of Quantity				
	Single-envelope (using only critical criteria and functional criteria)				
	TOTAL (excluding VAT)				
	VAT				
	TOTAL (including VAT)				

1. Delivery address:370 Nossob Street, Erasmuskloof
2. * Period required for commencement of delivery, after receipt of order:14 Days
3. * Rate of delivery: Not applicable
4. * Period required for completion of order, after receipt thereof: 5 months

* Must be completed by Bidder if not completed by Armscor



LIST OF APPENDICES

**THE APPOINTMENT OF A GENERAL BUILDING CONTRACTOR
TO RENOVATE THE ERASMUS CASTLE – EFAC 2023/12**

FILE NO. : EFAC 2023/12

ISSUE : VERSION 1

DATE : 28 August 2023

RESTRICTED**APPENDIX A****EVALUATION PROCESS & CRITICAL CRITERIA**

Each received bid will be evaluated in 5-stages.

STAGE 1	Specific Goals
STAGE 2	Critical Criteria
STAGE 3	Functionality Criteria – 75% minimum requirement
STAGE 4	Preference Point System: 80 (Price) / 20 (Specific goals)
STAGE 5	Special Requirement

12.1 STAGE 1: Specific Goals

- 12.1.1 Each bid will be assessed against the specific goals using the criteria set out under the specific goals.
- 12.1.2 Any bid with evidence documents that are not authentic will be disqualified and eliminated from further evaluation.
- 12.1.3 All bids with authentic evidence documentation will be allocated points according to the criteria and will be eligible for further evaluation under stage 2.
- 12.1.4 The specific goals are listed under Appendix B of this RFB document.

12.2 STAGE 2: Critical Criteria

- 12.2.1 Each bid will be assessed against the critical criteria requirements.
- 12.2.2 Should any bid fail to comply with any one of the critical criteria, the bid will be eliminated from further evaluation process.

Criteria No.	Criteria Description	Compliance Evidence
1.	The bidder shall attend a compulsory bidders briefing session and site visit.	The bidder shall complete and sign attendance register on the 20 September 2023 .The meeting will be @10:00 at Armscor HQ.
2.	The bidder shall have a valid registration with the Construction Industry Development Board (CIDB) as a general building contractor grading designation of at least 5GB	The bidder shall submit a CIDB registration letter indicating a unique CIDB CRS number. The bidder's registration must be valid and shall be at minimum CIDB 5GB at the closing date of the bid. All CIDB evaluation requirement will be applicable.
3.	The bidder shall fully comply with the Technical Requirements detailed in Appendix D of the RFB – Scope of Work and Bill of Quantity	The bidder shall complete and sign the Bid Condition Acceptance Form on page 7 of the KD17 of the RFB and submit with the Bid

2.3 STAGE 3: Functional Criteria

- 2.3.1 Each bid that complies with all critical criteria set under stage above will be evaluated further under functionality criteria.
- 2.3.2 Each bidder will be evaluated and allocated points based on the evidence provided against each criteria.
- 2.3.3 There are five (5) functionality criteria with total of 100 points – Appendix C
- 2.3.4 Any bidder who will score less than 75% will be disqualified from further evaluation.

2.4 STAGE 4: 80 (Price) / 20 (Specific Goals) Preference Point System

- 2.4.1 Each bid that complies with the minimum 75% set above shall be further evaluated in terms of the 80/ 20.
- 2.4.2 Bidders will complete the BOQ and price schedules under Appendix D
- 2.4.3 The prices on the schedules will be transferred to the KD17.
- 2.4.4 The price points allocation will be based on the price indicated in the KD17 including VAT.
- 2.4.5 The specific goal points collected during stage 1 will be added together with price points to determine total PPS points.
- 2.4.6 The 80/20 PPS is listed in Appendix B of this document.

2.5 STAGE 5: Special Requirement

- 2.5.1 A bid that will emerge as preferred bidder after the PPS stage above will be subjected to further assessment under the special requirement stage.
- 2.5.2 Should the bid fail to comply with any of the special requirements listed under Appendix E, the bidder will be afforded 7 days to submit the required evidence failing of which the bid will not be eligible for award.
- 2.5.3 The bid may only be awarded to a preferred bid that complies with all the Special Requirements.

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APPENDIX B

SPECIFIC GOALS

1. Each bid will be evaluated against the Specific Goals.
2. The Specific Goal applicable for this RFB is Locality.

Specific Goals for Procurement from Entities Located in Specific Province, Region or Municipality		PPS Points
RDP Programme: Locality		
1	Entities located within Gauteng Province	10 points
2	Entities located outside Gauteng Province	0 points
RDP Programme: Promotion of South African Owned Enterprises		
1	Entities which are BBBEE Level 1 with 51% black equity ownership	10 points
2	Entities which are BBBEE Level 2 with 51% black equity ownership	9 points
	Maximum Specific Goals points	20 Points

3. To qualify for Specific Goal: Locality points:

- 3.1 The bidder shall submit a municipal account indicating the bidder's business address in the Gauteng Province that is not older than three (3) months; or
- 3.2 If the municipal account is in the name of a third party, then the bidder shall submit:
 - 3.2.1 A municipal account indicating the third party's business address in Gauteng that is not older than three (3) months; and
 - 3.2.2 An occupancy/ rental agreement or similar agreement between the bidder and the third party, that is still valid at the closing date of the RFB.
- 3.3 Armscor reserves the right to conduct verification on any evidence submitted by the bidder and a bidder who will submit evidence that is not authentic will be disqualified from further evaluation.

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- 4. To qualify for the RDP Programme: Promotion of South African Black Owned Enterprises points,**
- 4.1 The bidder shall submit a valid proof of B-BBEE status (B-BBEE certificate issued by a SANAS accredited verification agency or CIPC B-BBEE certificate or B-BBEE affidavit duly sworn and commissioned).
- 4.2 If the bidder is a Joint Venture (JV) or Consortium, the bidder shall submit with the bid, a consolidated proof of B-BBEE status.
- 4.3 Armscor reserves the right to conduct verification on any evidence submitted by the bidder and a bidder who will submit evidence that is not authentic will be disqualified from further evaluation.

FUNCTIONALITY EVALUATION CRITERIA

Criteria No.	Criteria Description	Compliance Evidence	Points Allocation
1.	Professional Registration: The bidder shall allocate Construction Manager and Safety Officer registered with the SACPCMP	Evidence Required: The bidder shall submit SACPCMP registration certificate or letter for the Construction Manager and Safety Officer	a) Both the Construction Manager & Safety Officer are registered with the SACPCMP and their registration is valid – [20 points] b) Either a Construction Manager or Safety Officer has a valid registration with the SACPCMP – [10 points] c) Both the Construction Manager and Safety Officer do not have a valid registration with SACPCMP – [0 Points]
2.	Qualification & Skills of the Project Team	Evidence Required: The bidder shall submit Trade Test and/or Occupational Certificate(s) of project team member(s).	a) One or more project team member(s) has a Trade Test Certificate on Carpentry – [20 points] b) One or more project team member (s) has an a SAQA accredited Occupational Certificate on Carpentry – [10 points] c) No member of the project team has any qualification or skills training on carpentry – [0 points]
3.		The bidder's experience on renovation of heritage buildings.	Evidence Required: The bidder shall submit at least one contactable reference letter from their client where the renovation was conducted on a building designated as Heritage site/building. The reference letter must be on the client's letterhead (not the bidder's) and signed by a duly authorized person of the client.

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	<p>The letter must entail the following details:</p> <ul style="list-style-type: none">• Name of the client• Name of the bidder• Project Description – indicating heritage building/site• Contact details <p>OR</p> <p>A signed completion certificate issued by the principal agent / client where the renovation of a heritage building project was completed</p> <p><i>Note: Should the completion certificate not indicate the type of building, then additional supporting documents confirming heritage building, issued by the Client or Principal Agent or Main Contractor shall be submitted</i></p>	<p>d) The bidder did not submit any reference letter = [0 Points]</p>
4.	<p>The bidder's experience in projects involving installation or repair of timber</p>	<p>Evidence Required: The bidder shall submit at least one contactable reference letter from their client where timber installation or repair was completed. The reference letter must be on the client's letterhead (not the bidder's) and signed by a duly authorized person of the client.</p> <p>The letter must entail the following details:</p> <ul style="list-style-type: none">• Name of the client• Name of the bidder

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	<ul style="list-style-type: none">• Project Description – specify timber type• Contact details
OR	<p>A signed completion certificate issued by the principal agent / client where project involving timber was completed. The type of timber must also be indicated.</p> <p>Note: Should the completion certificate not indicate the type of timber, then additional supporting documents confirming type of timber, issued by the Client or Principal Agent or Main Contractor shall be submitted</p>

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APPENDIX D

BILL OF QUANTITY & PRICE SCHEDULE

Complete attached BOQ and transfer final amount to KD17 as form of offer

RESTRICTED**APPENDIX E****SPECIAL REQUIREMENTS**

1. Special requirements are non-negotiable and are required up and above the critical criteria and form part of sourcing and selection.
2. Should the bidder fail to submit evidence required for each of these requirement together with the bid, the bidder will be afforded 7 days from date of notice to submit the required evidence.
3. Failure to submit the required evidence within the specified period will deem the bid non-responsive and not legible for award.
4. There are two (2) special requirements applicable to this RFB and are detailed hereunder:

Requirement #	Requirement Description	Compliance Evidence
1	The bidder shall be in good standing with the Compensation Commissioner in terms of the Compensation of Occupational Injuries and Disability Act (COIDA).	The bidder shall submit a valid COIDA certificate issued by the Department of Employment and Labour or any other organization appointed by the Department of Employment and Labour.
2	The bidder shall be in good standing with the Construction Industry Development Board (CIDB).	Armscor shall determine the validity and registration status by printing the latest CIDB registration status on the CIDB online portal of registered contractor list

APPENDIX F
SPECIAL CONDITIONS

1. Special contract conditions are negotiated technical and project management stipulations that will become contractually binding on the successful Bidder. These requirements are specific to an order and are over-and-above those prescribed in the bid documentation.
2. Special contract Conditions are distinct from critical criteria in that they do not contribute to the source selection decision. The Bidder must, however, supply the necessary proof as indicated per special condition criterion.
3. The preferred Bidder will be notified that he/she is the preferred bidder and contract negotiations will commence after the Bidder was informed of his/her preferred status. The proof required to confirm the Bidders compliance with special contract conditions must be made available before site establishment.
4. It is to be noted that, although contract conditions do not contribute to the source selection process, non-compliance with certain of the identified special conditions may result in the cancellation of the contract.
5. There are three special conditions applicable to this RFB as follows:

5.1 Security Clearance of company and staff

- 5.1.1 Due to the security sensitive nature of Armscor all project team members must have a security clearance of at least restricted and the Service Provider shall ensure that all Guards that will be deployed at the various Armscor sites obtain and maintain the restricted security clearance.
- 5.1.2 Armscor Personnel Evaluation Division (APED) will do the necessary vetting and issue a Security Clearance Certificate. The costs for the first clearances will be paid by Armscor. Any subsequent security clearance required will be for the Bidder's cost.
- 5.1.3 The bidder must ensure that all guards (including new appointments / replacements) complete a personal security clearance application and hand it in for processing. Such individuals must also have the personal evaluation security interview (PESI) and sign a Non-Disclosure Agreement (NDA).
- 5.1.4 New appointments can only be made after confirmation with the Armscor Executive Manager: Security and Facilities. Armscor accepts no liability with respect to any negative outcome of a security clearance
- 5.1.5 Personal security clearance application to be completed and handed in for processing. Personal evaluation security interview (PESI) to be conducted and Non-Disclosure Agreement (NDA) to be signed before commencement of order.
- 5.1.6 The NDA will initially suffice for commencement of duties. The Service Provider shall, however, provide certified true copies of the APED Security Clearance certificates to the applicable Armscor site's Security Officer upon issuing.
- 5.1.7 Project Team members that cannot obtain the required security clearance will be replaced immediately by the Service Provider at his / her own cost.

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5.1.8 Confidential Security Clearance cost is R 3 812.00

5.2 Public Liability

The Preferred Bidder is required to have proof of current public liability insurance of at least R 6 million. The preferred bidder must submit proof within 7 working days of the award.

5.3 Project Team List

The successful bidder shall within 7 days from date of award submit the names, professional registration certificates and training certificates of the following key personnel:

- Construction Manager – SACPCMP
- Health & Safety Officer – SACPCMP
- Artisan – Occupational Certificate (SAQA) accredited

5.4 Project Schedule

The successful bidder shall submit a project schedule and methodology within 14 days from date of award.

ATI AFRICA CONSULTING ENGINEERS (PTY) LTD ARMSCOR
ARMSCOR ERASMUS CASTLE

SUMMARY OF SCHEDULE OF QUANTITIES

PART	DESCRIPTION	ORIGINAL CONTRACT
		AMOUNT R-C
PART 1	PRELIMINARY AND GENERAL	
PART 2	ERASMUS CASTLE	
PART 3	INTERNAL AND EXTERNAL HOUSE	
A: SUBTOTAL		
(Use to calculate CPG amount and percentage)		
B: CONTINGENCIES		
Add 5% of Subtotal A		
C: SUBTOTAL (A + B)		
D: CONTRACT PRICE ADJUSTMENT		
Add 0.25% of C for each month (The provisional sum provided here may be employed only as necessary in terms of the Contract Price Adjustment Schedule)		
E: SUBTOTAL (C+ D)		
F: VALUE ADDED TAX		
Add 15 % of Subtotal E (Provisional sum based on current rate of VAT)		
TOTAL (E + F): CARRIED TO FORM, C1.1, FORM OF OFFER		

ATI AFRICA CONSULTING ENGINEERS (PTY) LTD
ARMSCOR ERASMAS CASTLE

PART 1: PRELIMINARY AND GENERAL

ITEM NO	PAYMENT	DESCRIPTION	UNIT	QTY	RATE	AMOUNT (R)
	SANS1200 A	<u>PRELIMINARY AND GENERAL</u>				
	8,3	<u>FIXED CHARGES AND VALUE RELATED ITEMS</u>				
1,1	8.3.1	Contractual Requirements	Sum	1		
	8.3.2	Establishment of facilities on site:				
1,3	8.3.2b	Facilities for Contractor	Sum	1		
1,4	8.3.3	Other fixed-charge obligations including compliance with the Environmental Management Plan AND EPWP requirements and complying with Health and Safety Specifications	Sum	1		
1,5		Dealing with water from any source on the works	Sum	1		
1,7	8.3.3	Provision of access to the Works:				
	8.3.3	Access to the Works including all temporary roads, excavations and ramps, etc.	Sum	1		
		Accommodation and management of traffic (also refer to SANS 1921-2)	Sum	1		
1,9	8.3.4	Removal of site establishment at site camp and reinstatement to original condition	Sum	1		
1,10		Provision of shop drawings for all timber elements to be prepared by an architect which details all portions of the work for Erasmus Castle. The drawings are to be sent to the Engineer for approval prior to cutting/shaping.	Sum	1		
	8,4	<u>TIME RELATED CHARGES</u>				
1,12	8.4.1	Contractual Requirements	Weeks	6		
1,13	8.4.2	Operation and maintenance of facilities				
Total Carried Forward						

ATI AFRICA CONSULTING ENGINEERS (PTY) LTD
ARMSCOR ERASMAS CASTLE

PART 1: PRELIMINARY AND GENERAL

ATI AFRICA CONSULTING ENGINEERS (PTY) LTD
ARMSCOR ERASMAS CASTLE

PART 1: PRELIMINARY AND GENERAL

ATI AFRICA CONSULTING ENGINEERS (PTY) LTD
ARMSCOR ERASMAS CASTLE

PART 2: INTERNAL AND EXTERNAL HOUSE

ITEM NO	PAYMENT	DESCRIPTION	UNIT	QTY	RATE	AMOUNT (R)
2.1		<p>BALLUSTRADES & CANOPY</p> <p><u>Access, Install, Removal and appropriate disposal, Remediation, Design, Supply</u> of wood and steel material, <u>Cutting, Finishing, Sanding, Treating, Transporting to site, Installing complete with all fixings, consumables incl paint to match the existing spec for the woodwork and access to heights by means of scaffolding or a cherry picker to be incl.</u> Refer to SANS 10104</p> <p><i>Balustrades & Canopy to include all Horizontal & Vertical railings & decorative timber façade which also includes the structural supports, footings, Roof Sheeting, Canopy structure and facias boards. All items to match existing on a like for like basis. The items are to include all fixings. Contractor to confirm all items and measurements on site before ordering of materials. Refer to drawing No 1071-01-01 for front view of the balcony</i></p> <p>A) Periphery around building B) Walkway from building to Kitchen C) First Floor balcony D) Extended balcony (Stoep) on ground floor</p> <p>E) Extra Over for building F) Extra Over for walkway to kitchen G) Extra Over for first floor balcony H) Extra over for extended balcony stoep</p>				

2.2	<p>ROOF STRUCTURE</p> <p><u>Access, Install, Removal and appropriate disposal, Remediation, Design, Supply of wood and steel material, Cutting, Finishing, Sanding, Treating, Transporting to site, Installing complete with all fixing, consumables incl paint to match the existing spec for the woodwork and access to heights by means of scaffolding or a cherry picker to be incl. Refer to SANS 10400-L.2011</u></p> <p><i>Roof structure to include roof covering, structural items such as the rafters, battens, shingles, Ridge Flashings, Purlins, Eaves, backing boards, metal sheeting, priming roof sheetings, 2 coats of plascon or similar roof paint to roof sheeting, to include all waterproofing of joints and ridges etc and all other fixtures required to construct a roof. All items to match existing on a like for like basis. Contractor to confirm all items and measurements on site. Refer to report figure:10</i></p> <p>Roof sheeting - 0.6mm Class Z275 galvanised sheet iron</p> <table> <tbody> <tr> <td>A) Roof Structure throughout the building including gables and kitchen walkway</td> <td>m2</td> <td>1 170</td> </tr> <tr> <td>B) Roof Coverings for the building including the gables and kitchen walkway</td> <td>m2</td> <td>1 170</td> </tr> <tr> <td>C) Roof Structure from building to kitchen</td> <td>m2</td> <td>39</td> </tr> <tr> <td>D) Roof Coverings from building to kitchen</td> <td>m2</td> <td>39</td> </tr> <tr> <td>E) Extra Over roof coverings for building including gables and kitchen walkway</td> <td>m2</td> <td>50</td> </tr> <tr> <td>F) Extra Over roof structure for building including gables and kitchen walkway</td> <td>m2</td> <td>70</td> </tr> <tr> <td>G) Extra Over roof coverings for kitchen</td> <td>m2</td> <td>5</td> </tr> <tr> <td>H) Extra Over roof structure for kitchen</td> <td>m2</td> <td>5</td> </tr> </tbody> </table> <p>RAIN WATER GOODS</p> <p><u>Access, Install, Removal and appropriate disposal, Remediation, Design, Supply of wood and steel material, Cutting, Finishing, Sanding, Treating, Transporting to site, Installing complete with all fixing, consumables incl paint to match the existing spec for the woodwork/metal and access to heights by means of scaffolding or a cherry picker to be incl. Refer to SANS 10400-R.</u></p> <p><i>Rain water goods to include, Eaves, Gutters, downpipes, backing boards, metal sheeting, all bends, shoes and all other fixtures required to construct the roof and all rain water goods. All items to match existing on a like for like basis. Contractor to confirm all items and measurements on site. Refer to Figure:10 in report</i></p> <table> <tbody> <tr> <td>A) 100 x 75mm galvanised gutter around periphery of building incl of walkway to kitchen</td> <td>m</td> <td>215</td> </tr> <tr> <td>B) 100 x 75mm galvanised down pipes throughout the building incl of walkway to kitchen</td> <td>m</td> <td>109</td> </tr> <tr> <td>C) 100 x 75mm galvanised gutter around periphery of external kitchen</td> <td>m</td> <td>16</td> </tr> <tr> <td>D) 100 x 75mm galvanised down pipes throughout the kitchen</td> <td>m</td> <td>10</td> </tr> <tr> <td>E) Extra over for gutters</td> <td>m</td> <td>20</td> </tr> <tr> <td>F) Extra over for downpipes</td> <td>m</td> <td>20</td> </tr> </tbody> </table>	A) Roof Structure throughout the building including gables and kitchen walkway	m2	1 170	B) Roof Coverings for the building including the gables and kitchen walkway	m2	1 170	C) Roof Structure from building to kitchen	m2	39	D) Roof Coverings from building to kitchen	m2	39	E) Extra Over roof coverings for building including gables and kitchen walkway	m2	50	F) Extra Over roof structure for building including gables and kitchen walkway	m2	70	G) Extra Over roof coverings for kitchen	m2	5	H) Extra Over roof structure for kitchen	m2	5	A) 100 x 75mm galvanised gutter around periphery of building incl of walkway to kitchen	m	215	B) 100 x 75mm galvanised down pipes throughout the building incl of walkway to kitchen	m	109	C) 100 x 75mm galvanised gutter around periphery of external kitchen	m	16	D) 100 x 75mm galvanised down pipes throughout the kitchen	m	10	E) Extra over for gutters	m	20	F) Extra over for downpipes	m	20				
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2.3	INTERNAL & EXTERNAL CEILINGS				
	<p><u>Access, Install, Removal and appropriate disposal, Remediation, Design, Supply of wood and steel material, Cutting, Finishing, Sanding, Treating, Transporting to site, Installing complete with all fixing, consumables incl paint to match the existing spec for the woodwork and access to heights by means of scaffolding or a cherry picker to be incl. Refer to SANS 10005.</u></p> <p><i>Ceilings, Partitions, wall facades to include all items such as the wooden cladding, cornices, Underlay, and all other materials. All materials to match existing on a like for like basis. Contractor to confirm all items and measurements Refer to drawing No 1071- for front view of building.</i></p>				
	<p>A) Timber tongue & Groove ceilings boards in building incl vertical boards m2 760</p> <p>A) Timber tongue & Groove ceilings boards in balcony incl vertical boards m2 280</p> <p>B) Timber tongue & Groove ceilings from building to kitchen incl vertical boards m2 30</p> <p>C) Timber tongue & Groove ceiling in Kitchen incl vertical boards m2 20</p> <p>E) Internal wall m2 30</p> <p>D) Extra Over m2 30</p>				
2.4	WALL FASCADES				
	<p><u>Access, Install, Removal and appropriate disposal, Remediation, Design, Supply of wood and steel material, Cutting, Finishing, Sanding, Treating, Transporting to site, Installing complete with all fixing, consumables incl paint to match the existing spec for the woodwork and access to heights by means of scaffolding or a cherry picker to be incl. Refer to SANS 754:2012.</u></p> <p><i>Wall facades to include all items such as the wooden cladding, fixings, cornices, Underlay, wall paper glue, to incl timber brandering for fixing and all other materials. To match existing on a like for like basis. Refer to drawing No 1071-01 - 01 for front view of building</i></p>				
	<p>A) External Façade on building face walls (Contractor to confirm m2 on site) m2 43</p> <p>B) Remediation of damaged portion of internal wallpaper due to water ingress. (refer to defect sheet in Annex) m2 26</p> <p>B) Extra Over m2 10</p>				
2.5	FLOORING				
	<p><u>Access, Install, Removal and appropriate disposal, Remediation, Design, Supply of wood and steel material, Cutting, Finishing, Sanding, Treating, Transporting to site, Installing complete with all fixing, consumables incl paint to match the existing spec for the woodwork and access to heights by means of scaffolding or a cherry picker to be incl. Refer to SANS 10400-J:2010</u></p> <p><i>Flooring to include all materials, fixing items, underlay and cornices. Contractor to confirm all items and measurements prior to ordering of materials. To match existing on a like for like basis. Refer to figure:20 in report</i></p>				
	<p>A) Damaged portion on staircase to the first floor m2 20</p> <p>B) External balcony on the first floor (Contractor to confirm measurements on site) m2 30</p> <p>C) Extra Over m2 5</p>				
Total Carried Forward					

PART 2: INTERNAL AND EXTERNAL HOUSE

Total Carried Forward				
2.6				
	WINDOWS & FRAMES			
	<i>Access, Install, Removal and appropriate disposal, Remediation, Design, Supply of wood and steel material, Cutting, Finishing, Sanding, Treating, Transporting to site. Installing complete with all fixing, consumables incl paint to match the existing spec for the woodwork and access to heights by means of scaffolding or a cherry picker to be incl. Refer to SANS 754:2012.</i>			
	<i>Windows & frames to match original on a like for like basis and to included, glazing, fixing accessories, Putty, ironmongery and other fixing items, paint for wooden frames. Contractor to confirm items, materials, measurements and No of Windows and details on site prior to ordering any material. Refer to figure:20</i>			
	Building			
	A) Single Square Window overall size 1200 x 500mm	No	8	
	B) Double Window overall size 1800 x 1200mm	No	5	
	C) Square Window overall size 500 x 500mm	No	1	
	D) Extra over Single Square Window overall size 1200 x 500mm	No	2	
	E) Extra over Double Window overall size 1800 x 1200mm	No	1	
	F) Extra over Square Window overall size 500 x 500mm	No	1	
	Extended Stoep in on balustrade			
	A) Irregular External Windows on Façade Canopy overall size 4100 x 1000mm	No	1	
	B) Irregular External Windows on Façade Canopy overall size 850 x 950mm	No	8	
	D) Extra over Irregular External Windows on Façade Canopy overall size 850 x 950mm	No	1	
	First Floor Balcony façade			
	A) Timber window frame overall size 3150 x 690mm	No	1	
	B) Timber window frame overall size 1200 x 500mm	No	3	
	C) Timber window frame overall size 1600 x 500mm	No	1	
	D) Timber window frame overall size 2200 x 500mm	No	1	
	E) Timber window frame overall size 4000 x 500mm	No	1	
	Tower			
	A) Single rectangle Window overall size 1800 x 1300mm	No	2	
	B) Irregular shaped window overall size 1640 x 700mm	No	2	
	C) Irregular shaped timber overall size window 800 x 1400mm	No	1	
	D) Extra over Single rectangle Window overall size 1800 x 1300mm	No	1	
	E) Extra over Irregular shaped window overall size 1640 x 700mm	No	1	
	F) Extra over Irregular shaped timber overall size window 800 x 1400mm	No	1	
	Kitchen			
	A) Single rectangle Window overall size 1800 x 1300mm	No	4	
	B) Extra over Single rectangle Window overall size 1800 x 1300mm	No	1	
	Second floor table			
	A) Square Window overall size 500 x 500mm	No	2	
	B) Extra over Square Window overall size 500 x 500mm	No	1	

2.7	SANS 10400	<p>DOORS & FRAMES</p> <p><u>Access, Install, Removal and appropriate disposal, Remediation, Design, Supply of wood and steel material, Cutting, Finishing, Sanding, Treating, Transporting to site, Installing complete with all fixing, consumables incl paint to match the existing spec for the woodwork and access to heights by means of scaffolding or a cherry picker to be incl. Refer to SANS 754:2012.</u></p> <p><i>Doors & frames to be included, glazing, fixing accessories, hinges, Putty, ironmongery and other items, Contractor to confirm items, materials, measurements and No of doors on site prior to ordering or material. Refer to figure:16</i></p> <p>Building</p> <table> <tr> <td>A) Refurbishment of Main access doors</td><td>No</td><td>1</td></tr> <tr> <td>B) Victorian Single Door with glass panels</td><td>No</td><td>2</td></tr> <tr> <td>C) Victorian Double Door</td><td>No</td><td>8</td></tr> <tr> <td>D) Victorian Quadruple Door</td><td>No</td><td>1</td></tr> </table> <p>Second Floor Balcony</p> <table> <tr> <td>A) Victorian Single Door</td><td>No</td><td>1</td></tr> <tr> <td>B) Victorian Double Door</td><td>No</td><td>3</td></tr> </table> <p>Kitchen</p> <table> <tr> <td>A) Victorian Single Door</td><td>No</td><td>3</td></tr> </table>	A) Refurbishment of Main access doors	No	1	B) Victorian Single Door with glass panels	No	2	C) Victorian Double Door	No	8	D) Victorian Quadruple Door	No	1	A) Victorian Single Door	No	1	B) Victorian Double Door	No	3	A) Victorian Single Door	No	3			
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2.8		<p>INTERNAL/EXTERNAL WALL CRACKS</p> <p><u>Access, Install, Removal and appropriate disposal, Remediation, Design, Supply of wood and steel material, Cutting, Finishing, Sanding, Treating, Transporting to site, Installing complete with all fixing, consumables incl paint to match the existing spec for the woodwork and access to heights by means of scaffolding or a cherry picker to be incl. Refer to SANS 10400-K:2015.</u></p> <p><i>External crack repair to include all materials, fixing accessories and other items. Contractor to confirm items, measurements on site prior to ordering or materials. Refer to defect sheets found in appendix in report incl a method statement.</i></p> <table> <tr> <td>A) Minor wall cracks 0 ≥ 3mm (Defect sheets can be found in Annexure)</td><td>m2</td><td>4</td></tr> <tr> <td>B) Extra over</td><td>m2</td><td>1</td></tr> </table> <p>PAINTWORK TO BUILDING</p> <p><u>Access, Install, Removal and appropriate disposal, Remediation, Design, Supply of wood and steel material, Cutting, Finishing, Sanding, Treating, Transporting to site, Installing complete with all fixing, consumables incl paint to match the existing spec for the woodwork and access to heights by means of scaffolding or a cherry picker to be incl. Refer to SANS 1091.</u></p> <p><i>Paintwork to include surface preparation, primer paint, paint with a minimum of 2 coats, brush's and rollers and any other accessories required. Contractor to confirm measurements on site.</i></p> <table> <tr> <td>A) External Paint on walls</td><td>m2</td><td>850</td></tr> <tr> <td>B) Face brick pattern on external walls</td><td>m2</td><td>25</td></tr> <tr> <td>C) Extra over for external paint on wall</td><td>m2</td><td>35</td></tr> <tr> <td>D) Extra over for brick pattern on external wall</td><td>m2</td><td>5</td></tr> </table>	A) Minor wall cracks 0 ≥ 3mm (Defect sheets can be found in Annexure)	m2	4	B) Extra over	m2	1	A) External Paint on walls	m2	850	B) Face brick pattern on external walls	m2	25	C) Extra over for external paint on wall	m2	35	D) Extra over for brick pattern on external wall	m2	5						
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	Total Carried Forward																									

PART 3: DAYWORKS

ITEM NO	PAYMENT	DESCRIPTION	UNIT	QTY	RATE	AMOUNT (R)
3.1	8.6	DAYWORKS - PLANT				
	8.6	Inclusive of supervision, transport:				
	8.6	Compactor: Pedestrian vibratory roller 0,5 ton			Rate Only	
	8.6	Compressor: 250 cfm (7m ³ /min) capacity complete with normal ancillary equipment			Rate Only	
	8.6	Concrete Mixers: Up to 0,6 m ³ dry capacity			Rate Only	
	8.6	Excavator/TLB: Rubber tyred up to 45 kW and mass of 5 t			Rate Only	
	8.6	500Ton Mobile Crane			Rate Only	
	8.6	Tracked excavator: CAT 220 or equivalent			Rate Only	
	8.6	Hand guided vibrating plate compactor (Wacker)			Rate Only	
	8.6	1 ton LDV			Rate Only	
	8.6	5 ton flat bed truck with hoist			Rate Only	
	8.6	Tip Truck (10m ³ double diff capacity)			Rate Only	
	8.6	Tip Truck (5 m ³ capacity)			Rate Only	
	8.6	Oxy-acetylene cutting torch			Rate Only	
	8.6	Pipe welding unit complete with generator			Rate Only	
	8.6	Submersible pump for dewatering			Rate Only	
	8.6	Water tanker - 15kl			Rate Only	
3.2	8.6	DAYWORKS - LABOUR				
	8.6	Provide the following categories of labour. Rate shall include for all allowances, overheads, profit, supervision, transport and use of small tools:			Rate Only	
	8.6	Foreman			Rate Only	
	8.6	Welder, API 1104 certified			Rate Only	
	8.6	Other Artisan			Rate Only	
	8.6	Semi-skilled labour			Rate Only	
	8.6	Unskilled labourer			Rate Only	

Total Carried Summary Page

**ARMAMENTS CORPORATION OF SOUTH AFRICA SOC LTD
(ARMSCOR)**

QUESTIONNAIRE

REPLIES

1 What is the request for bid number?

2 If applicable: Price basis of bid
(if not delivered into store)

3 Indicate which of the following applies:

3.1 The prices are fixed.

3.2 The prices are not fixed (NB:

4 The delivery period shall be fixed

.....
.....

WHERE SUPPLIES OFFERED ARE TO BE IMPORTED, THE QUESTIONS BELOW MUST BE ANSWERED.

5 Foreign content:

5.1 What amount in foreign currency must be remitted overseas?

5.2 What is the rate of exchange used in converting the amount into ZAR1, 00=.....

SA Rand and the date on which this is based? Date

6 Statutory costs:

6.1 Are the goods quoted on subject to customs duty,
ad valorem customs or surcharge?

6.2 If so, what is the amount payable in respect of

a) Customs duty?

b) Ad valorem customs duty?

PRICE BREAKDOWN

7. The following particulars must be furnished, failure of which may invalidate the bids.

	AMOUNT	% OF TOTAL PRICE
7.1 FOB/FCA cost of item		
7.2 Sea/Air freight		
7.3 Insurance charges		
7.4 Clearance charges		
7.5 Customs duties		
7.6 Ad valorem customs duties		
7.7 Delivery costs from port/airport to your premises		
7.8 Local content (excluding 10.10)		
7.9 Delivery costs from your premises into store		
7.10 Balance (detail to be submitted)		
	TOTAL	

-1-

BROAD-BASED BLACK ECONOMIC EMPOWERMENT**ACRONYMS AND ABBREVIATIONS**

B-BBEE	Broad-Based Black Economic Empowerment
CIPC	Companies and Intellectual Property Commission
COTS	Commercial Off The Shelf
EME	Exempted Micro Enterprises
MOTS	Military Off The Shelf
QSE	Qualifying Small Enterprises
SANAS	South African National Accreditations Systems

1. PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000

1.1 The B-BBEE preference points will be awarded in terms of the Preferential Procurement Policy Framework Act, 2000: Preferential Procurement Regulations, 2022.

1.2 The 80/20 preference point system is applicable to all bids with a Rand value of up to R50 000 000,00 (all applicable taxes included)

1.3 Preference points for this bid shall be awarded for:

Price	80
Specific Goals	20
Total points for Price and Specific Goals must not exceed	100

1.4 **Bidders who do not submit a valid proof of B-BBEE status will score zero (0) for preference points (B-BBEE Status Level Specific Goals).**

2. ALLOCATION OF PREFERENCE POINTS FOR SPECIFIC GOALS

2.1 B-BBEE Status Level

2.1.1 The preference points for specific goals will be allocated according to the table below, for acquisition of services, works or goods with a value of up to R50 000 000,00. B-BBEE Points claimed must be in accordance with the table below and must be substantiated by means of a valid proof of B-BBEE.

(Specific Goals) B-BBEE status level	Points Allocated
Level 1	20
Level 2	18
Level 3	14
Level 4	12
Level 5	8
Level 6	6
Level 7	4
Level 8	2
Non-compliant	0

2.1.2 The Armscor BBE Division reserves the right to require a bidder and/or its sub-contractor(s) to substantiate any claim at any stage in the bidding process to verify and confirm the B-BBEE status of the bidder and/or its sub-contractor(s).

2.2 Specific Goals for Local Content & Production

2.2.1 The preference points that may be awarded in terms of the specific goals with regards to procurement processes where local content & production is applicable shall be as follows:

No	Specific Goals for Procurement from Entities with local manufacturing capabilities for designated sectors	Points for 80/20 PPS*
Designated Sectors		
1	Full compliance to the applicable minimum threshold for local content	10 points
2	Non-compliance to the applicable minimum threshold for local content	0 points
RDP Programme: Promotion of South African Owned Enterprises		
1	Entities which are BBBEE Level 1 with 51% black equity ownership	10 points
2	Entities which are BBBEE Level 2 with 51% black equity ownership	9 points
Maximum Points Available Per PPS*		20 points

*PPS stands for Preferential Point System

2.2.1 List Of Designated Sectors & Sub-Sectors

The complete list of sectors and sub-sectors which are designated for local production with a minimum local content threshold can be found on the website of the Department of Trade, Industry & Competition via the link below

<http://www.thedtic.gov.za/sectors-and-services-2/industrial-development/industrial-procurement/>

2.2.2 Specific Goals For Locality

The preference points that may be awarded in terms of the specific goals with regards to Procurement from Entities Located in Specific Province, Region or Municipality are as follows:

No	Specific Goals for Procurement from Entities Located in Specific Province, Region or Municipality	Points for 80/20 PPS
RDP Programme: Locality		
1	Entities located within the specific locality	10 points
2	Entities located outside the specific locality	0 points
RDP Programme: Promotion of South African Owned Enterprises		
1	Entities which are BBBEE Level 1 with 51% black equity ownership	10 points
2	Entities which are BBBEE Level 2 with 51% black equity ownership	9 points
Maximum Points Available Per PPS*		20 points

3. PRINCIPLES

3.1 Valid proof of B-BBEE status is either of the following:

3.1.1 A B-BBEE Sworn Affidavit fully completed and

- 3.1.1.1 Deposed and signed in the presence of the Commissioner of Oaths**
- 3.1.1.2 Does not contradict itself (% black ownership matches compliance level)**
- 3.1.1.3 Commissioner of Oaths credentials and signature are reflected.**

3.1.2 A B-BBEE Certificate issued by either the CIPC or a SANAS Accredited Verification Agency

3.1.3 An unincorporated Joint Venture / Consortium must submit a Consolidated B-BBEE Certificate in the name of the Joint Venture / Consortium issued by a SANAS accredited Verification Agency.

3.1.4 B-BBEE status must be based on the latest financial year-end information, otherwise it is invalid and unacceptable.

3.2 Sub-Contracting

3.2.1 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.

3.2.2 A bidder awarded a contract must obtain the approval of Armscor prior to any changes in the subcontracting arrangement.

B-BBEE DECLARATION

1. Confirmation of the Bidder's Turnover

Name of the Bidder			
Registration Number			
Financial Year End			
Turnover (As at the latest financial year end)	R	Starting (Day, Month, Year)	Ending (Day, Month, Year)

2. Confirmation of Subcontractors involved in the execution of the order:

Bidder	% Black Ownership	B-BBEE Status	% Value to be Contracted
1.			
Subcontractors	% Black Ownership	B-BBEE Status	% Value to be Contracted
1.			
2.			
3.			

*Percentages of the bid value which will be subcontracted including main contractor must add up to 100%.

3. Confirmation of Suppliers involved in the execution of the order:

Supplier's name	% Black Ownership	B-BBEE status	% Value to be Supplied
1.			
2.			
3.			
4.			
5.			

I, the undersigned, am duly authorised to certify on behalf of the abovementioned entity that the information contained herein above is true and correct.

AUTHORISED SIGNATURE : Date:

Name in block letters :

Capacity :

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise, employed by the state? **YES/NO**

2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of institution

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

2.2.1 If so, furnish particulars:

.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

2.3.1 If so, furnish particulars:

¹⁰ See, for example, the discussion of the 1992 Constitutional Convention in the *Constitutional Convention of 1992: The Final Report* (1993).

1 the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

3 DECLARATION

I, the undersigned, (name)..... in submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.
 I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

² Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

DEFENCE SECTOR BBBEE SWORN AFFIDAVIT – EXEMPTED MICRO ENTERPRISE

I, the undersigned,

Full name & Surname	
Identity number	

Hereby declare under oath as follows:

1. The contents of this statement are to the best of my knowledge a true reflection of the facts.
2. I am a Member / Director / Owner of the following enterprise and am duly authorised to act on its behalf:

Enterprise Name:	
Trading Name (If Applicable):	
Registration Number:	
Type of Entity (CC, (Pty) Ltd, Sole Prop etc.):	
Nature of Business:	
Definition of “Black People”	As per the Broad-Based Black Economic Empowerment Act 53 of 2003 as Amended by Act No 46 of 2013 “Black People” is a generic term which means Africans, Coloureds and Indians – (a) who are citizens of the Republic of South Africa by birth or descent; or (b) who became citizens of the Republic of South Africa by naturalisation- i. before 27 April 1994; or ii. on or after 27 April 1994 and who would have been entitled to acquire citizenship by naturalization prior to that date;”
Definition of “Black Designated Groups	“Black Designated Groups means: (a) unemployed black people not attending and not required by law to attend an educational institution and not awaiting admission to an educational institution; (b) Black people who are youth as defined in the National Youth Commission Act of 1996; (c) Black people who are persons with disabilities as defined in the Code of Good Practice on employment of people with disabilities issued under the Employment Equity Act; (d) Black people living in rural and under developed areas; (e) Black military veterans who qualifies to be called a military veteran in terms of the Military Veterans Act 18 of 2011;”

ANNEXURE 1 TO KD24

3. I hereby declare under Oath that:

- The Enterprise has _____ % Black Owned as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9 (1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013,
- The Enterprise has _____ % Black Female Owned as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9 (1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013,
- The Enterprise has _____ % Black Designated Group Beneficiaries as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9 (1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013,
- Black Designated Group Owned % Breakdown as per the definition stated above:
 - Black Youth % = _____ %
 - Black people living with disabilities % = _____ %
 - Black Unemployed % = _____ %
 - Black People living in Rural areas % = _____ %
 - Black Military Veterans % = _____ %

- Based on the Financial Statements/Management Accounts and other information available on the latest financial year-end of _____, the annual Total Revenue was R5,000,000.00 (Five Million Rands) or less
- Please confirm on the table below the B-BBEE level contributor, **by ticking the applicable box**.

100% Black Owned	Level One (135% B-BBEE procurement recognition)	
At Least 51% Black Owned	Level Two (125% B-BBEE procurement recognition)	
Less than 51% Black Owned	Level Four (100% B-BBEE procurement recognition)	

4. I know and understand the contents of this affidavit and I have no objection to take the prescribed oath and consider the oath binding on my conscience and on the owners of the enterprise which I represent in this matter.

5. The sworn affidavit will be valid for a period of 12 months from the date signed by commissioner.

Commissioner of Oaths Credentials and Signature	Deponent
	Signature
Date	Date

ANNEXURE 2 TO KD24

DEFENCE SECTOR BBBEE SWORN AFFIDAVIT – QUALIFYING SMALL ENTERPRISE

I, the undersigned,

Full name & Surname	
Identity number	

Hereby declare under oath as follows:

1. The contents of this statement are to the best of my knowledge a true reflection of the facts.
2. I am a Member / Director / Owner of the following enterprise and am duly authorised to act on its behalf:

Enterprise Name:	
Trading Name (If Applicable):	
Registration Number:	
Type of Entity (CC, (Pty) Ltd, Sole Prop etc.):	
Nature of Business:	
Definition of "Black People"	<p>As per the Broad-Based Black Economic Empowerment Act 53 of 2003 as Amended by Act No 46 of 2013 "Black People" is a generic term which means Africans, Coloureds and Indians –</p> <ul style="list-style-type: none"> (a) who are citizens of the Republic of South Africa by birth or descent; or (b) who became citizens of the Republic of South Africa by naturalisation- <ul style="list-style-type: none"> i. before 27 April 1994; or ii. on or after 27 April 1994 and who would have been entitled to acquire citizenship by naturalization prior to that date;"
Definition of "Black Designated Groups"	<p>"Black Designated Groups means:</p> <ul style="list-style-type: none"> (a) unemployed black people not attending and not required by law to attend an educational institution and not awaiting admission to an educational institution; (b) Black people who are youth as defined in the National Youth Commission Act of 1996; (c) Black people who are persons with disabilities as defined in the Code of Good Practice on employment of people with disabilities issued under the Employment Equity Act; (d) Black people living in rural and under developed areas; (e) Black military veterans who qualifies to be called a military veteran in terms of the Military Veterans Act 18 of 2011;"

3. I hereby declare under Oath that:

- The Enterprise has _____ % Black Owned as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9 (1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013,
- The Enterprise has _____ % Black Female Owned as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9 (1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013,
- The Enterprise has _____ % Black Designated Group Beneficiaries as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9 (1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013,
- Black Designated Group Owned % Breakdown as per the definition stated above:
 - Black Youth % = _____ %
 - Black people living with disabilities % = _____ %
 - Black Unemployed % = _____ %
 - Black People living in Rural areas % = _____ %
 - Black Military Veterans % = _____ %
- Based on the Financial Statements/Management Accounts and other information available on the latest financial year-end of _____, the annual Total Revenue was between R5,000,000.00 (Five Million Rands) to R50,000,000.00 (Fifty Million Rands)
- Please confirm on the table below the B-BBEE level contributor, **by ticking the applicable box**.

100% Black Owned	Level One (135% B-BBEE procurement recognition)	
At Least 51% Black Owned	Level Two (125% B-BBEE procurement recognition)	

4. I know and understand the contents of this affidavit and I have no objection to take the prescribed oath and consider the oath binding on my conscience and on the owners of the enterprise which I represent in this matter.

5. The sworn affidavit will be valid for a period of 12 months from the date signed by commissioner.

Commissioner of Oaths Credentials and Signature	Deponent
	<hr/> Signature
<hr/> Date	<hr/> Date

ANNEXURE 1 TO KD25

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF ARMSCOR				
BID NUMBER:	CLOSING DATE:		CLOSING TIME:	
DESCRIPTION				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT :				
ARMSCOR BID BOX VISITORS ENTRANCE (BLOCK 8), 370 NOSSOB STREET,				
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:	
CONTACT PERSON	Mr. A.L Mmbengwa		CONTACT PERSON	Mr. A.L Mmbengwa
TELEPHONE NUMBER	012 428 3610		TELEPHONE NUMBER	012 428 3610
FACSIMILE NUMBER	N/A		FACSIMILE NUMBER	N/A
E-MAIL ADDRESS	scmbids@armscor.co.za		E-MAIL ADDRESS	scmbids@armscor.co.za
SUPPLIER INFORMATION				
NAME OF BIDDER				
POSTAL ADDRESS				
STREET ADDRESS				
TELEPHONE NUMBER	CODE		NUMBER	
CELLPHONE NUMBER				
FACSIMILE NUMBER	CODE		NUMBER	
E-MAIL ADDRESS				
VAT REGISTRATION NUMBER				
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No: MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT <input type="checkbox"/> Yes <input type="checkbox"/> No	
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]				
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSURE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS				
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?			<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE A BRANCH IN THE RSA?			<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?			<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?			<input type="checkbox"/> YES <input type="checkbox"/> NO	
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?			<input type="checkbox"/> YES <input type="checkbox"/> NO	
IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.				

ANNEXURE 1 TO KD25

1. BID SUBMISSION:

- 1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
- 1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED—(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.
- 1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 202, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.

2. TAX COMPLIANCE REQUIREMENTS

- 2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
- 2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
- 2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
- 2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
- 2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
- 2.6 WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
- 2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE.”

NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

SIGNATURE OF BIDDER:

CAPACITY UNDER WHICH THIS BID IS SIGNED:
(Proof of authority must be submitted e.g. company resolution)

DATE:

**ARMAMENTS CORPORATION OF SOUTH AFRICA LIMITED
(ARMSCOR)**

INTELLECTUAL PROPERTY REQUIREMENTS

1 INTRODUCTION

1.1 What is Intellectual Property?

Intellectual Property (or “IP”) means the result or outcome of human creative effort as typically, but not exclusively, manifested and embodied in or taking the form of data items or documents.

IP typically includes design and mental activities, e.g.:

- Bills of Material (BOM's)
- Instructions,
- Reports,
- Specifications,
- Interface designs,
- Manufacturing processes,
- Material Specifications,
- Processes,
- Product designs,
- Re-engineering (maintenance/obsolescence),
- Software,
- Algorithms,
- Source Codes,
- System/integration designs,
- Test and Evaluation Methods, etc.

IP typically excludes Project Management activities and Hardware created/built according to a design or following a “recipe”.

1.2 How is IP manifested?

IP is typically manifested and embodied in Data Items or Documents.

“Data items or Documents” means any recorded information, however recorded, including but not limited to books, manuscripts, reports, studies, algorithms, computer software, invention descriptions, registered patents, drawings, designs, plans, analyses, calculations, standards, data packs, process documents, instructions, specifications, mathematical or simulation models, compositions, photographs, video recordings, audio recordings, reports, holographic recordings, trademarks, graphical images, etc.

NOTE:

- The document itself is not IP
- The contents of a document represent IP
- The document becomes the tangible and recordable carrier of IP

1.3 What is Background IP?

For definition, refer to A-STD-0020 “Armscor General Conditions of Contract”.

“Background IP” belongs to a contractor because he fully paid for the generation thereof or had bought it at his own cost, which may be used or serve as a basis from which to develop new Foreground IP.

1.4 What is Historic IP?

“Historic IP” is existing IP which was created previously, and which may serve as a basis from which to develop new Foreground IP.

1.5 What is Foreground IP?

For definition, refer to A-STD-0020 “Armscor General Conditions of Contract”.

“Foreground IP” is new intellectual property that is created during the execution of the order.

1.6 When is IP Shared or Jointly Owned or Co-owned?

For the definition, refer to A-STD-0020 “Armscor General Conditions of Contract”.

“Shared” or “Jointly Owned” or “Co-owned” IP is IP which belongs to both the DOD and a contractor, because both contributed to the cost of generation thereof. Ownership is typically (and preferably) proportional to contribution.

Historic and Foreground IP may be either

1. Wholly owned by the DOD; or
2. Shared or Jointly Owned or Co-owned between DOD or the contractor

2. IP RECORDAL REQUIREMENTS

It is a requirement that prospective suppliers provide all information about applicable Intellectual Property (IP) to the bid. Armscor will record the information on their IP System that will generate a Statement of IP which will be appended to the order. The Statement of IP will serve as a contractual agreement between Armscor and the contractor in so far as IP related matters are concerned.

The recordal requirements are further described herein and broken down to an appropriate level, as follows:

2.1 Background IP Utilised

For each Background IP Item that will be modified or utilised to generate Foreground IP in the execution of the quoted scope of work, provide the following details:

- Short IP description
- Original Supplier
- Cost of Establishment (If available)

2.2 Historic IP Utilised

For each Historical IP item that will be modified or is required as a prerequisite in the execution of the quoted scope of work, provide the following details:

- Armscor IP Number (if available)
- Short IP description
- The next information is to be provided **per order**, on which Historic IP was established:
 - Order Number on which Historic IP was generated
 - Master record index (MRI) reference
 - Original Supplier
 - Cost of Establishment
 - Percentage Ownership (DOD)
 - Associated Milestone / Line item on the order under which the IP was established

2.3 Foreground IP to be generated

For each new Foreground IP item that will be generated in the execution of the quoted scope of work, provide the following details:

- IP number of Historic IP, if IP is enhanced (modified/improved/upgraded).
- Short IP description
- Master record index (MRI) reference with version and date
- Original Supplier
- Cost of Establishment
- Percentage Ownership (DOD)
- Associated Milestone / Line item on the order under which the IP will be established.

Note 1: The cost of establishment has always been included in item/milestone prices of order, and will continue to be so included, but will in future become visible by being shown separately in the Statement of IP appended to orders in order to properly manage such IP;

Note 2: To facilitate the easy and correct recording of IP, bidders and contractors will be required to utilise the specially constructed spread sheet from Armscor's web site.

After completion, the spreadsheet must be printed and attached to the bid, which will thus form an integral part of the bid.

3. SAFEGUARDING OF IP

3.1 IP Agreement

The IP agreement which will be embodied in the Statement of IP will be concluded with the main contractor in the name of the main contractor and will apply to the creating sub-contractor(s), who will remain the design authority for his particular IP.

3.2 Management and Safeguarding of IP

The main contractor will be responsible for the management of IP he generated during the execution of the order, as well as the management of IP generated by his sub-contractors. Upon completion of the project or order, the relevant IP will be formally transferred to the main contractor, who will then be responsible for the continued management of such IP.

The main contractor will be responsible for proper safeguarding and configuration control of IP, including off-site back-ups, as further described in various other Armscor documents, e.g. A-STD-0020 "Armscor General Conditions of Contract, K-STD-61 "Armscor Standard for Technical Contract Conditions", A-WI-014 "Armscor Security Instruction" and other documents that may be applicable.

3.3 IP Delivery

Notwithstanding 3.2 above, upon completion of the order, the main contractor will deliver all data items or documents relating to the IP generated during the execution of the order to Armscor ADAC Department.

3.4 IP Audits

Armscor is by law required to conduct an IP or intangible asset audit of all existing DOD IP every financial year. The main contractor will cooperate with Armscor's Intellectual Property Management Division and the Auditor General during the audit period and will make available all relevant information required to conduct the audit.

4. COMPLETION OF THE IP INFORMATION BY MEANS OF THE ELECTRONIC FORM

4.1 Background

The electronic form of the KD27 IP Information.xlsx is available as a Microsoft Excel workbook on the Armscor website (www.armscor.co.za/Downloads/Download.asp) and must be used as template to provide the relevant IP information.

The workbook consists of the following three spreadsheets:

- “Background IP” provides a form to capture all background IP information
- “Historic IP” provides a form to capture all historic IP information.
- “Foreground IP” provides a form to capture all foreground IP information.

4.2 Electronic Form Definitions

The column definitions as provided in the forms are as follows:

IP Name	A short descriptive name to identify the IP item.
IP Number	Armscor Number provided to Historic IP.
IP Description	An abridged description of the IP Item.
Original Supplier	The name of the supplier at which the IP item exists or was established.
Establishment Cost	The amount paid by Armscor to establish the IP Item (including VAT).
MRI Reference	The Master Record Index (MRI) or other document reference that uniquely describe the IP.
DOD Shareholding	The percentage of the IP that belongs to the DOD through Armscor
Associated Milestone/Item	The contractual milestone or item, which when completed, will define the point in time at which the IP will be established.

5. INTELLECTUAL PROPERTY QUESTIONNAIRE

I/We, the undersigned, who warrant that I/we am/are duly authorised to do so on behalf of the firm certify that the following information is correct and complete in terms of Intellectual Property relevant to the offered scope of work. (Please circle the relevant answer)

Will Background IP be applicable during the execution of the quoted scope of work? Yes No

If yes, state particulars by completing the 'Background IP' worksheet. Indicate each IP item as a separate line.

Will Historic IP be utilised and/or is it required as a prerequisite to execute the quoted scope of work? Yes No

If yes, state particulars by completing the 'Historic IP' worksheet for each IP item. Indicate each IP item as a separate line;

Will any of these Historic IP items be enhanced during the execution of the quoted scope of work? Yes No

If yes, also complete the 'Foreground IP' worksheet for those IP items

Will new Foreground IP be generated during the execution of the quoted scope of work? Yes No

If yes, state particulars by completing the 'Foreground IP' worksheet for each IP item. Indicate each IP item as a separate line.

This completed form, along with all additional information, as requested above where relevant, populated on the KD27 Spreadsheet, have to be attached to the bid.

WITNESSES:

1 _____

2 _____

SIGNATURES OF BIDDER(S)

DATE:

ADDRESS: _____