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## EXPRESION OF INTEREST (EOI)

**APPOINTMENT OF A PANEL OF CONTRACTORS WITH CIDB GRADING OF  
7EB /EP OR HIGHER FOR THE DESIGN, SUPPLY, INSTALLATION AND  
COMMISIONING OF BATTERY STORAGE/SOLAR PV + BATTERY  
STORAGE AS BACKUP AT HEALTH CARE FACILITIES IN SOUTH AFRICA  
FOR A PERIOD OF 36 MONTHS**

**RFQ NO: IDT-NDOH-PANELSOLAR-01**

**CLOSING DATE: 30 OCTOBER 2023 AT 12H00**

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### **SUPPLIER'S INFORMATION** (Must be completed by Supplier)

Company Name	
Contact Person	
Cell / Tel Number	
CRS No.	
CSD Number	
E-mail Address	

**PREPARED FOR:**

**THE INDEPENDENT DEVELOPMENT TRUST**

IDT HEAD OFFICE  
Glenwood Office Park  
Corn. Oberon & Sprite Ave.  
Faerie Glen, Pretoria  
0081

	<b>CONTENTS</b>	
<b>Part</b>	<b>Number</b>	<b>Heading</b>
<b>Part 1</b>		<b>Submission procedures</b>
	T1.1	Notice and invitation to submit an expression of interest
	T1.2	Submission Data
	T1.3	Standard Conditions for the calling for Expressions of Interest
<b>Part 2</b>		<b>Submission procedures</b>
	T2.1	List of returnable documents
	<b>T2.2</b>	<b>Returnable schedules</b>
	T2.2a	Resolution for Signatory
	T2.2b	Record of Addenda
	T2.2c	SBD1
	T2.2d	SBD4
	T2.2i	Compulsory Enterprise Questionnaire
	T2.2j	Proof of CSD Registration
	T2.2k	Proof of CIDB Registration
	T2.2m	Valid Letter of Good Standing
	T2.2r	Preferred areas of Operation
<b>Functionality Evaluation</b>		
	T2.2o	Preferably evidence of registration with relevant associations; SESSA, SAPVIA or ISES
	T2.2p	Schedule of Key Personnel (including CV's)
	T2.2q	Project Reference Forms 1 – 5

## T1.1 – NOTICE AND INVITATION TO SUBMIT AN EXPRESSION OF INTEREST

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The Independent Development Trust hereby invites Built Environment Service Providers with a CIDB Grading's of 7 or Higher in the following Class of works (**EB, or EP**) to submit their Expression of interest for the assignment.

Expression of Interest documents are downloadable for free of charge from National Treasury's eTender Portal: (<http://www.etenders.gov.za/content/advertised-tenders>). The document is also available from the [www.idt.gov.za](http://www.idt.gov.za) and CIDB website as from **10 OCTOBER 2023**

Service Providers are expected to, along compliance issues, meet the Functionality/Quality criteria score of 70 points to be admitted into the list.

Qualifying Service Providers will be registered on the Independent Development Trust (IDT) Panel of Service Providers List for the design, installation and commissioning of battery storage/solar PV + battery storage as backup at health care facilities in South Africa for a period of thirty-six (36) months. They are expected to have their resources and planning processes ready to urgently respond to whichever need arises within South Africa.

This is an invitation of Expression of Interest (EOI) to the Independent Development Trust (IDT).

Service Providers must be registered on the National Treasury Central Supplier Data Base and proof of registration must be submitted with the proposal (<https://secure.csd.gov.za>).

Submissions should be clearly marked in a sealed envelope indicating the relevant Expression of Interest reference number and deposited in the address stated above.

It is the responsibility of the Service Provider to ensure that (EOI) document is submitted on or before closing time and date at the correct location as the IDT will not take responsibility of wrong delivery. Service Providers who are using courier services for delivery of their (EOI) documents must ensure the delivery is at the correct place / location and time.

No briefing session will be held. Technical enquiries shall be directed only in writing to Supply Chain Management enquiries to (**panelsolarcontractors@idt.org.za**) within office hours.

The closing time for receipt of submissions by the IDT is 12H00 on 30 October 2023. Telegraphic, telephonic, telex, facsimile, e-mail and late submissions will not be accepted. (EOI) submissions must be submitted in sealed envelopes clearly marked "Expressions of interest No: **IDT-PANELSOLAR-01** must be deposited in the bid box. In addition to the hard copy submission the bidder is required to submit a scanned identical PDF submission in a memory stick.

**IDT HEAD OFFICE  
Glenwood Office Park  
Corn. Oberon & Sprite Ave.  
Faerie Glen, Pretoria  
0081**

Register of bidders will be published on the CIDB website and IDT website.

All other prerequisites as detailed in the (EOI) documents shall apply.

Issued by:

Supply Chain Management  
Independent Development Trust

## T1.2 – SUBMISSION DATA

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The standard conditions for calling for Expressions of Interest make several references to the submission data and shall have precedence in the interpretation of any ambiguity or inconsistency between the submission data and the standard conditions for calling for expressions of interest.

Each item of data given below is cross-referenced to the clause in the standard conditions of the Expression of Interest to which it mainly applies.

Clause Number	Submission Data
	The employer is: The Independent Development Trust
	<p>The (EOI) documents issued by the employer comprises:</p> <p><b>E1: Submission procedures</b></p> <p>E1.1 Notice and invitation to submit an expression of interest</p> <p>E1.2 Submission data</p> <p>E1.3 Standard Conditions for the calling for Expression of Interest</p> <p><b>E2: Returnable documents</b></p> <p>E2.1 List of returnable documents</p> <p>E2.2 Submission schedules</p> <p><b>E3: Indicative scope of work</b></p> <p>E3.1 Introduction</p> <p>E3.2 Indicative scope of work</p>
	<p><i>The employer's agent is:</i></p> <p>Name: William Kaipa</p> <p>IDT HEAD OFFICE Glenwood Office Park Corn. Oberon &amp; Sprite Ave. Faerie Glen, Pretoria 0081</p> <p>E-mail: <a href="mailto:panelsolarcontractors@idt.org.za">panelsolarcontractors@idt.org.za</a></p>
	The language for communications is English
	No compulsory clarification meeting

Clause Number	Submission Data
	Telephonic, telegraphic, telex, facsimile or e-mailed tender offers shall not be accepted.
	The closing time for submission of expressions of interest is as stated in the Notice and invitation to submit an expression of interest (ref. E1.1).
	Late submissions will be returned unopened after the closing time stated in the submission data, unless it is necessary to open a submission to obtain a forwarding address, to the respondent concerned.

## T1.3– STANDARD CONDITIONS FOR THE CALLING FOR EXPRESSION OF INTEREST

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### D.1 General

#### D.1.1 Actions

D.1.1.1 The employer and each respondent submitting an expression of interest shall comply with these conditions for calling for expressions of interest. In their dealings with each other, they shall discharge their duties and obligations as set out in D.2 and D.3, timeously and with integrity, and behave equitably, honestly and transparently, comply with all legal obligations and not engage in anti-competitive practices.

D.1.1.2 The employer and the respondent and all their agents and employees involved in the submission process shall avoid conflicts of interest and where a conflict of interest is perceived or known, declare any such conflict of interest, indicating the nature of such conflict. Respondents shall declare any potential conflict of interest in their submissions. Employees, agents, and advisors of the employer shall declare any conflict of interest to whoever is responsible for overseeing the procurement process at the start of any deliberations relating to the procurement process or as soon as they become aware of such conflict and abstain from any decisions where such conflict exists or recuse themselves from the procurement process, as appropriate.

**Note:** 1) *A conflict of interest may arise due to a conflict of roles which might provide an incentive for improper acts in some circumstances. A conflict of interest can create an appearance of impropriety that can undermine confidence in the ability of that person to act properly in his or her position even if no improper acts result.*

2) *Conflicts of interest in respect of those engaged in the procurement process include direct, indirect or family interests in the tender or outcome of the procurement process and any personal bias, inclination, obligation, allegiance or loyalty which would in any way affect any decisions taken.*

D.1.1.3 The respondent shall not make a submission without having a firm intention and the capacity to proceed with the next stage of the procurement process.

#### D.1.2 Supporting documents

The documents issued by the employer for the purpose of obtaining expressions of interest are listed in the submission data.

### **D.1.3 Interpretation**

D.1.3.1 The submission data and additional requirements contained in the submission schedules that are included in the returnable documents are deemed to be part of these conditions for the calling for expressions of interest.

D.1.3.2 For the purposes of these conditions for the calling for expressions of interest, the following definitions apply:

- a) **conflict of interest** means any situation in which:
  - i) someone in a position of trust has competing professional or personal interests which make it difficult to fulfil his or her duties impartially. ii) an individual or Service Provider is able to exploit a professional or official capacity in some way for their personal or corporate benefit.
  - iii) incompatibility or contradictory interests exist between an employee and the Service Provider which employs that employee.
- b) **corrupt practice** means the offering, giving, receiving or soliciting of anything of value to influence the action of the employer or his staff or agents in the (EOI) submission process; and
- c) **fraudulent practice** means the misrepresentation of the facts in order to influence the (EOI) submission process or the award of a contract arising from an (EOI) submission offer to the detriment of the employer, including collusive practices intended to establish prices at artificial levels

### **D.1.4 Communication and employer's agent**

Each communication between the employer and a respondent shall be to or from the employer's agent only, and in a form that can be readily read, copied and recorded. Communications shall be in the English language. The employer shall not take any responsibility for non-receipt of communications from or by a respondent. The name and contact details of the employer's agent are stated in the submission data.

## **D.2 Respondent's obligations**

### **D.2.1 Eligibility**

Submit an expression of interest only if the respondent complies with the criteria stated in the submission data and the respondent, or any of his principals, is not under any restriction to do business with the employer.

### **D.2.2 Cost of submissions**

Accept that the employer will not compensate the respondent for any costs incurred in the preparation and delivery of a submission.

### **D.2.3 Check documents**

Check the submission documents on receipt, including pages within them, and notify the employer of any discrepancy or omission.

### **D.2.4 Acknowledge addenda**

Acknowledge receipt of addenda to the submission documents, which the employer may issue, and if necessary, apply for an extension to the closing time stated in the submission data, to take the addenda into account.

### **D.2.5 Clarification meeting**

No clarification meeting.

### **D.2.6 Seek clarification**

Request clarification of the submission documents, if necessary, by notifying the employer at least seven (7) working days before the closing time stated in the submission data.

### **D.2.7 Making a submission**

D.2.7.1 Return all returnable documents to the employer after completing them in their entirety, either electronically (if they were issued in electronic format) or by writing legibly in non-erasable ink.

D.2.7.2 Seal the original and USB in a combined package marking the packages as "ORIGINAL" and "USB". The package shall state on the outside the employer's address and identification details stated in the submission data, as well as the respondent's name and contact address. D.2.7.3 Accept that the employer shall not assume any responsibility for the misplacement or premature opening of the submission if the outer package is not sealed and marked as stated.

### **D.2.8 Information and data to be completed in all respects**

Accept that submissions, which do not provide all the data or information requested completely and, in the form, required, may be regarded by the employer as non-responsive.

### **D.2.9 Closing time**

Ensure that the employer receives the submissions at the address specified in the submission data not later than the closing time stated in the submission data. Proof of posting shall not be accepted as proof of delivery. The employer shall not accept submissions submitted by telegraph, telex, facsimile or e-mail, unless stated otherwise in the submission data.

Accept that, if the employer extends the closing time stated in the submission data for any reason, the requirements of these conditions for expressions of interest apply equally to the extended deadline.

#### **D.2.10 Clarification of submission**

Provide clarification of a submission in response to a request to do so from the employer during the evaluation of submissions.

#### **D.3 Employer's undertakings**

D.3.1 Respond to clarification Respond to a request for clarification received up to seven (7) working days before the submission closing time stated in the submission data and notify all respondents who attended the clarification meetings, if any, of those responses.

#### **D.3.2 Issue Addenda**

If necessary, issue addenda that may amend or amplify the submission documents to each respondent during the period from the date of the calling for expressions of interest until seven days before the closing time for submissions stated in the submission data. If, as a result, a respondent applies for an extension to the closing time stated in the submission data, the employer may grant such extension and shall then notify it to all respondents.

#### **D.3.3 Late submissions**

Unless otherwise stated in the submission data, return submissions received after the closing time stated in the submission data, unopened, (unless it is necessary to open a submission to obtain a forwarding address), to the respondent concerned.

#### **D.3.4 Opening of submissions**

D.3.4.1 Record the name of each respondent whose submission is opened and acknowledge receipt of each submission.

D.3.4.2 Make available the names of the respondents that made submissions prior to the closing time for submissions to all interested persons upon request.

#### **D.3.5 Non-disclosure**

Not disclose to respondents, or to any other person not officially concerned with such processes, information relating to the evaluation and comparison of submissions until after the evaluation process is complete.

#### **D.3.6 Grounds for rejection and disqualification**

Determine whether there has been any effort by a respondent to influence the processing of submissions and instantly disqualify a respondent if it is established that he engaged in corrupt or fraudulent practices.

#### **D.3.7 Test for responsiveness**

Determine, on opening and before detailed evaluation, whether each submission received:

- a) meets the requirements of these conditions for the calling for expressions of interest.
- b) has all the substantive provisions properly and fully completed and signed, and
- c) is responsive to the other requirements of the call for expressions of interest.

#### **D.3.8 Non-responsive submissions**

Reject all non-responsive submissions.

#### **D.3.9 Evaluation of responsive submissions**

D.3.9.1 Appoint an evaluation panel of not less than three persons. Evaluate submissions using the evaluation criteria established in the submission data.

D.3.9.2 Notify the respondents of the outcome of the evaluation process within two (2) weeks of the evaluation report being accepted by the employer.

#### **D.3.10 Provide written reasons for actions taken**

Provide upon request written reasons to respondents for any action that is taken in applying these conditions but withhold information which is not in the public interest to be divulged, which is considered to prejudice the legitimate commercial interests of respondents or might prejudice fair competition between respondents.

## T2.1 – LIST OF RETURNABLE DOCUMENTS

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### A-1 For the (EOI) submission evaluation

T2.2a	Resolution for Signatory
T2.2b	Record of Addenda
T2.2c	SBD1
T2.2d	SBD4
T2.2i	Compulsory Enterprise Questionnaire
T2.2j	Proof of CSD Registration
T2.2k	Proof of CIDB Registration
T2.2m	Valid Letter of Good Standing
T2.2o	Preferably evidence of registration with relevant associations; SESSA, SAPVIA or ISES
T2.2p	Schedule of Key Personnel (including CV's)
T2.2q	Project Reference Forms 1 – 5

## T2.2a: RESOLUTION FOR SIGNATORY

Project Name:	APPOINTMENT OF A PANEL OF CONTRACTORS TO THE DESIGN, SUPPLY, AND INSTALLATION OF BATTERY STORAGE/SOLAR PV + BATTER STORAGE AS BACKUP AT PRIMARY HEALTH CARE FACILITIES FOR THIRTY-SIX (36) MONTHS
Bid Number:	IDT-PANELSOLAR-01

### MUST BE ON COMPANY LETTERHEAD

#### A: CERTIFICATE OF AUTHORITY FOR SIGNATORY

Signatory for companies shall confirm their authority hereto by attaching a duly signed and dated copy of the relevant resolution of the board of directors to this form. This must be on a company letterhead.

An example is given below:

"By resolution of the board of directors passed at a meeting held on \_\_\_\_\_

Mr/Ms \_\_\_\_\_, whose signature appears below, has been duly authorised to  
sign all documents in connection with the Supplier for Contract No. \_\_\_\_\_

and any Contract which may arise there from on behalf of (Block Capitals)

\_\_\_\_\_  
SIGNED ON BEHALF OF THE COMPANY: \_\_\_\_\_

IN HIS/HER CAPACITY AS: \_\_\_\_\_ DATE: \_\_\_\_\_ SIGNATURE: \_\_\_\_\_

WITNESSES:

1. \_\_\_\_\_ SIGNATURE: \_\_\_\_\_

2. \_\_\_\_\_ SIGNATURE: \_\_\_\_\_

## T2.2b: RECORD OF ADDENDA TO SUPPLIER DOCUMENTS

<b>Project Name:</b>	<b>APPOINTMENT OF A PANEL OF CONTRACTORS TO THE DESIGN, SUPPLY, AND INSTALLATION OF BATTERY STORAGE/SOLAR PV + BATTERY STORAGE AS BACKUP AT PRIMARY HEALTH CARE FACILITIES FOR THIRTY-SIX (36) MONTHS</b>
<b>Bid Number:</b>	<b>IDT-PANELSOLAR-01</b>

We confirm that the following communications received from the Employer before the submission of this Supplier offer, amending the (EOI) documents, have been considered in this Supplier offer:

	<b>Date</b>	<b>Title or Details</b>
<b>1.</b>		
<b>2.</b>		
<b>3.</b>		
<b>4.</b>		
<b>5.</b>		

Attach additional pages if more space is required.

Signed

\_\_\_\_\_

Date

\_\_\_\_\_

Name

\_\_\_\_\_

Position

\_\_\_\_\_

Supplier

\_\_\_\_\_

\*This document must form part of the returnable schedules as it is referenced in the offer portion of the Form of Offer and Acceptance.

\_\_\_\_\_

## PART A INVITATION TO BID

<b>YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)</b>					
BID NUMBER:	<b>IDT-PANELSOLAR-01</b>	CLOSING DATE: <b>30 OCTOBER 2023</b>		CLOSING TIME:	<b>12H00</b>
DESCRIPTION	<b>APPOINTMENT OF A PANEL OF CONTRACTORS WITH CIDB GRADING OF 7EB /EP OR HIGHER FOR THE DESIGN, SUPPLY, INSTALLATION AND COMMISSIONING OF BATTERY STORAGE/SOLAR PV + BATTERY STORAGE AS BACKUP AT HEALTH CARE FACILITIES IN SOUTH AFRICA FOR A PERIOD OF 36 MONTHS</b>				
<b>BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)</b>					
IDT Head Office					
Glenwood Office Park, Corn. Oberon & Sprite Ave.					
Faerie Glen,					
Pretoria, 0043					
<b>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO</b>			<b>TECHNICAL ENQUIRIES MAY BE DIRECTED TO:</b>		
CONTACT PERSON			CONTACT PERSON		
TELEPHONE NUMBER			TELEPHONE NUMBER		
FACSIMILE NUMBER			FACSIMILE NUMBER		
E-MAIL ADDRESS			E-MAIL ADDRESS		
<b>SUPPLIER INFORMATION</b>					
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:		<b>OR</b>	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		[TICK APPLICABLE BOX]  <input type="checkbox"/> Yes <input type="checkbox"/> No
<b>[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES &amp; QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]</b>					

ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]	ARE YOU A FOREIGN BASED SUPPLIER FOR <b>THE GOODS /SERVICES /WORKS OFFERED?</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW ]
<b>QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS</b>			
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	
<b>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.</b>			

## PART B TERMS AND CONDITIONS FOR BIDDING

<b>1. BID SUBMISSION:</b>
1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
1.2. <b>ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.</b>
1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
1.4. <b>THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).</b>
<b>2. TAX COMPLIANCE REQUIREMENTS</b>
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 PIN 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: .....

## T2.2d: SBD 4

### BIDDER'S DISCLOSURE (SBD 4)

#### 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 interest<sup>1</sup> 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	State

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:

.....  
.....

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<sup>1</sup> 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 consortium<sup>2</sup> 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

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<sup>2</sup> 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.

## T2.2j: COMPULSORY ENTERPRISE QUESTIONNAIRE

The following particulars must be furnished.

**Section 1: Name of enterprise:** .....

**Section 2: VAT registration number:** .....

**Section 3: CIDB Registration number, if any.** .....

**Section 4: Particulars of sole proprietors and partners in partnerships**

Name*	Identity number*	Personal income tax number*

*\* Complete only if sole proprietor or partnership and attach separate page if more than 3 partners*

**Section 5: Particulars of companies and close corporations**

Company registration number .....

Close corporation number .....

Tax reference number .....

**Section 6: The attached SBD 4 must be completed for each tender and be attached as a tender requirement.**

The undersigned, who warrants that he/she is duly authorised to do so on behalf of the enterprise:

- i) authorizes the Employer to obtain a tax clearance certificate from the South African Revenue Services that my / our tax matters are in order;
- ii) confirms that the neither the name of the enterprise or the name of any partner, manager, director or other person, who wholly or partly exercises, or may exercise, control over the enterprise appears on the Register of Supplier Defaulters established in terms of the Prevention and Combating of Corrupt Activities Act of 2004;

- iii) confirms that no partner, member, director or other person, who wholly or partly exercises, or may exercise, control over the enterprise appears, has within the last five years been convicted of fraud or corruption;
- iv) confirms that I / we are not associated, linked or involved with any other (EOI) Submission entities submitting Supplier offers and have no other relationship with any of the Suppliers or those responsible for compiling the scope of work that could cause or be interpreted as a conflict of interest;
- iv) confirms that the contents of this questionnaire are within my personal knowledge and are to the best of my belief both true and correct.

Signed

Date

Name

Position

## **T2.2j – PROOF OF REGISTRATION ON THE NATIONAL TREASURY CENTRAL SUPPLIER DATABASE (CSD REPORT)**

(ATTACH HERE)

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## **T2.2j – ACTIVE PROOF OF CIDB REGISTRATION**

(TO BE ATTACHED HERE)

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**T2.2m - VALID LETTER OF GOOD STANDING**

**(TO BE ATTACHED HERE)**

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## T2.2o – LOCATION OF A CONTRACTOR

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Distance from worksite

Provide physical address/address 1 and contact details of the Service Provider.

This must be the address on CSD / Municipal rate address / Signed lease agreement IDT will verify the address if the submission is not satisfactory.

<p><u>NAME OF SERVICE PROVIDER:</u></p> <p>_____</p> <p><u>PHYSICAL ADDRESS / ADDRESS:</u></p> <p>_____</p> <p>_____</p> <p><u>TELEPHONE:.....</u></p> <p><u>CONTACT PERSON:.....</u></p>
---

The undersigned, who warrants that she/ he is duly authorised to do so on behalf of the enterprise, confirms that the content of this schedule that presented by the Service Provider are within my personal knowledge and are to the best of my knowledge both true and correct.

Signed

Date

\_\_\_\_\_  
Name

\_\_\_\_\_  
Position

Enterprise name

\_\_\_\_\_

## T2.2p – SCHEDULE OF KEY PERSONNEL

---

### **Evaluation schedule 1: Expertise of key personnel & CV's**

The experience of the key persons who will be responsible on behalf of the contractor for the management of the project and the project team will be evaluated in relation to her/ his academic and **qualifications and experience**.

#### **Please Note:**

1. The Respondent must complete the CV template provided in this document for each personnel it intends to claim capacity for and that meets the criteria.
2. A Certified copy of the key personnel's qualifications.
3. Only five projects must be submitted.

The CIDB *Competence Standard* for Service Providers established the competencies that should exist within a contracting enterprise within a CIDB Class of Construction Works, within a Construction Category and where relevant within a sub-Category.

For the purposes of this document, the following terms and definitions apply:

- **class of construction works:** the class of construction works referred to in Schedule 3 of the Construction Industry Development Regulations 2004 and 2013 as amended and published in terms of the Construction Industry Development Board Act of 2000 (Act 38 of 2000).
- **competent:** having suitable or sufficient skill, knowledge, and experience.
- **construction category:** 'Open', 'Limited' or 'Trade Contractor' defined in Section 3.1.
- **contractor:** person or organization that contracts to provide the goods, services or engineering and construction works covered by the contract.

**CURRICULUM VITAE AND CERTIFICATES OF QUALIFICATION OF KEY PERSONNEL  
(COMPULSORY) – for each person**

<b>Name:</b>	<b>Date of Birth:</b>
<b>Profession:</b>	<b>Nationality:</b>
<b>Qualifications:</b>	
<b>Name of Employer (firm):</b>	
<b>Current position:</b>	
<b>Employment Record:</b>	
<h1>Example Only</h1>	
<b>Experience Record Pertinent to Required service:</b>	

*Attach a separate sheet which details all the above key information. No submission of this information will lead to a Service Provider losing points on Quality/ Functionality evaluation. Attach a CV to detail the above information*

**The undersigned, who warrants that she/ he is duly authorised to do so on behalf of the enterprise, confirms that the content of this schedule that presented by the Service Provider are within my personal knowledge and are to the best of my knowledge both true and correct.**

Signed

Date

\_\_\_\_\_  
Name

\_\_\_\_\_  
Position

\_\_\_\_\_  
Enterprise name

## **T2.2q – PROJECT REFERENCE FORMS 1- 5**

### **REQUIRED RETURNABLE FUNCTIONALITY EVALUATION DOCUMENTS**

The Bidder shall provide details of their relevant experience relating to electrical engineering services that includes design, supply and installation of solar PV and battery storage backup. Project Experience returnable schedule and attach thereto scored and signed reference forms or a reference letter hereto attached from the Employer confirming completion of such a project, and copies of (a) Letters of Appointment

## T2.2q – FIRM’S EXPERIENCE ON SIMILAR PROJECTS

PROJECT NAME	BRIEF PROJECT DESCRIPTION	Employer Details			PROJECT VALUE (Including VAT)	START DATE	COMPLETION DATE
		Name	Telephone	Email			
A							
B							
C							
D							
E							
F							

## T2.2q.1 EVALUATION SCHEDULE: EXPERIENCE ON SIMILAR PROJECTS REFERENCES

The Bidder shall provide details of his performance on each of the previous projects listed in the "Relevant Experience" returnable schedule. "Employer Reference Scorecards" will be completed by each of the respective Employers for the projects listed in the "Relevant Experience" returnable schedule.

### REPORT ON BIDDER'S COMPETENCE & PERFORMANCE ON A SIMILAR PROJECT FOR BID RECOMMENDATION PURPOSES

The following are to be completed by the Employer and is to be supported in each case accompanied by Signed Appointment Letter; (ii) Signed and Stamped Reference (in the form issued to the bidder)

**PROJECT A:**

Type of Project, e.g. (new school, renovation of clinic): .....

Employer: .....

Contract Amount: .....

Contract Duration: .....

Actual Contract Duration:.....

### RATE SERVICE PROVIDER ON THEIR OVERALL PERFORMANCE

DESCRIPTION	SCORE	TICK APPROPRIATE SCORING
Very Good	5	
Good	4	
Satisfactory	3	
Poor	2	
Not Acceptable	1	

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

Employer's contact person: .....

Telephone:.....

I hereby declare that to the best of my knowledge, information completed above is true and correct and I understand that I will be held responsible for any misrepresentation.

Employer Signature:.....

Date:.....

STAMP

## T2.2q.2 EVALUATION SCHEDULE: EXPERIENCE ON SIMILAR PROJECTS REFERENCES

The Bidder shall provide details of his performance on each of the previous projects listed in the "Relevant Experience" returnable schedule. "Employer Reference Scorecards" will be completed by each of the respective Employers for the projects listed in the "Relevant Experience" returnable schedule.

### REPORT ON BIDDER'S COMPETENCE & PERFORMANCE ON A SIMILAR PROJECT FOR BID RECOMMENDATION PURPOSES

The following are to be completed by the Employer and is to be supported in each case accompanied by Signed Appointment Letter; (ii) Signed and Stamped Reference (in the form issued to the bidder)

**PROJECT B:**

Type of Project, e.g. (new school, renovation of clinic): .....

Employer: .....

Contract Amount: .....

Contract Duration: .....

Actual Contract Duration:.....

### RATE SERVICE PROVIDER ON THEIR OVERALL PERFORMANCE

DESCRIPTION	SCORE	TICK APPROPRIATE SCORING
Very Good	5	
Good	4	
Satisfactory	3	
Poor	2	
Not Acceptable	1	

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

Employer's contact person: .....

Telephone:.....

I hereby declare that to the best of my knowledge, information completed above is true and correct and I understand that I will be held responsible for any misrepresentation.

Employer Signature:.....

Date:.....

STAMP

## T2.2q.3 EVALUATION SCHEDULE: EXPERIENCE ON SIMILAR PROJECTS REFERENCES

The Bidder shall provide details of his performance on each of the previous projects listed in the "Relevant Experience" returnable schedule. "Employer Reference Scorecards" will be completed by each of the respective Employers for the projects listed in the "Relevant Experience" returnable schedule.

### REPORT ON BIDDER'S COMPETENCE & PERFORMANCE ON A SIMILAR PROJECT FOR BID RECOMMENDATION PURPOSES

The following are to be completed by the Employer and is to be supported in each case accompanied by Signed Appointment Letter; (ii) Signed and Stamped Reference (in the form issued to the bidder)

**PROJECT C:**

Type of Project, e.g. (new school, renovation of clinic): .....

Employer: .....

Contract Amount: .....

Contract Duration: .....

Actual Contract Duration:.....

### RATE SERVICE PROVIDER ON THEIR OVERALL PERFORMANCE

DESCRIPTION	SCORE	TICK APPROPRIATE SCORING
Very Good	5	
Good	4	
Satisfactory	3	
Poor	2	
Not Acceptable	1	

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

Employer's contact person: .....

Telephone:.....

I hereby declare that to the best of my knowledge, information completed above is true and correct and I understand that I will be held responsible for any misrepresentation.

Employer Signature:.....

Date:.....

STAMP

## T2.2q.4 EVALUATION SCHEDULE: EXPERIENCE ON SIMILAR PROJECTS REFERENCES

The Bidder shall provide details of his performance on each of the previous projects listed in the “Relevant Experience” returnable schedule. “Employer Reference Scorecards” will be completed by each of the respective Employers for the projects listed in the “Relevant Experience” returnable schedule.

### REPORT ON BIDDER’S COMPETENCE & PERFORMANCE ON A SIMILAR PROJECT FOR BID RECOMMENDATION PURPOSES

The following are to be completed by the Employer and is to be supported in each case accompanied by Signed Appointment Letter; (ii) Signed and Stamped Reference (in the form issued to the bidder)

**PROJECT D:**

Type of Project, e.g. (new school, renovation of clinic): .....

Employer: .....

Contract Amount: .....

Contract Duration: .....

Actual Contract Duration:.....

### RATE SERVICE PROVIDER ON THEIR OVERALL PERFORMANCE

DESCRIPTION	SCORE	TICK APPROPRIATE SCORING
Very Good	5	
Good	4	
Satisfactory	3	
Poor	2	
Not Acceptable	1	

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

Employer’s contact person: .....

Telephone:.....

I hereby declare that to the best of my knowledge, information completed above is true and correct and I understand that I will be held responsible for any misrepresentation.

Employer Signature:.....

Date:.....

STAMP

## T2.2q .5 EVALUATION SCHEDULE: EXPERIENCE ON SIMILAR PROJECTS REFERENCES

The Bidder shall provide details of his performance on each of the previous projects listed in the "Relevant Experience" returnable schedule. "Employer Reference Scorecards" will be completed by each of the respective Employers for the projects listed in the "Relevant Experience" returnable schedule.

### REPORT ON BIDDER'S COMPETENCE & PERFORMANCE ON A SIMILAR PROJECT FOR BID RECOMMENDATION PURPOSES

The following are to be completed by the Employer and is to be supported in each case accompanied by Signed Appointment Letter; (ii) Signed and Stamped Reference (in the form issued to the bidder)

**PROJECT E:**

Type of Project, e.g. (new school, renovation of clinic): .....

Employer: .....

Contract Amount: .....

Contract Duration: .....

Actual Contract Duration:.....

### RATE SERVICE PROVIDER ON THEIR OVERALL PERFORMANCE

DESCRIPTION	SCORE	TICK APPROPRIATE SCORING
Very Good	5	
Good	4	
Satisfactory	3	
Poor	2	
Not Acceptable	1	

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

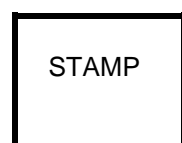
Employer's contact person: .....

Telephone:.....

I hereby declare that to the best of my knowledge, information completed above is true and correct and I understand that I will be held responsible for any misrepresentation.

Employer Signature:.....

Date:.....



## T2.2r – AREA OF OPERATION

For the purposes of Local Economic Development, service providers may be required to work in the provinces where they have operational offices (Proof will be required in terms of FICA documents)

Please tick to select (one or more)	Area of operation
<b>PROVINCE</b>	
<input type="checkbox"/>	
<input type="checkbox"/>	Northwest
<input type="checkbox"/>	Limpopo
<input type="checkbox"/>	Kwazulu-Natal
<input type="checkbox"/>	Mpumalanga
<input type="checkbox"/>	Eastern Cape
<input type="checkbox"/>	Northern Cape
<input type="checkbox"/>	Western Cape
<input type="checkbox"/>	Free State

The undersigned, who warrants that she/ he is duly authorised to do so on behalf of the enterprise, confirms that the content of this schedule that presented by the Service Provider are within my personal knowledge and are to the best of my knowledge both true and correct.

Signed

Date

\_\_\_\_\_

\_\_\_\_\_

Name

Position

\_\_\_\_\_

\_\_\_\_\_

## RESPONSIVENESS EVALUATION

For all grades the following table will be applicable as a qualifying measure.

Resolution of Signatory	<input type="checkbox"/>	SBD 1	<input type="checkbox"/>
Record of Addenda	<input type="checkbox"/>	SBD 4	<input type="checkbox"/>
Compulsory Enterprise Questionnaire	<input type="checkbox"/>	Valid Letter of Good Standing	<input type="checkbox"/>
Proof of CSD Registration	<input type="checkbox"/>	Location of Contractor (Proof of Address to be attached)	<input type="checkbox"/>
Preferably evidence of registration with relevant associations; SESSA, SAPVIA or ISES	<input type="checkbox"/>		<input type="checkbox"/>
Valid CIDB Registration	<input type="checkbox"/>		<input type="checkbox"/>
Company Profile (Key Personnel with <b>certified</b> qualification to be attached with this)	<input type="checkbox"/>	)	<input type="checkbox"/>

Service Providers must have all the boxes checked, if any of the boxes does not have a supporting document attached the Service Provider will not be considered for this Expression of Interest.

## FUNCTIONALITY/QUALITY EVALUATION

The evaluation criteria and maximum score in respect of each of the criteria are given hereunder.

A Service Provider scoring an average score below **70 points** in Functionality points will be considered as DISQUALIFIED for evaluation and will be discarded from any further evaluation.

Quality Criteria	Evaluation Schedule	Maximum number of points
Expertise of key personnel	Schedule 1	35
Relevant project experience	Schedule 2	30
Project reference	Schedule 3	30
Registration with relevant associations; SESSA, SAPVIA or ISES	Schedule 4	5
<b>Maximum possible score for functionality (M<sub>s</sub>)</b>		<b>100</b>

Functionality shall be scored by not less than three evaluators in accordance with the above-mentioned schedules:

The minimum number of evaluation points for quality is **70**.

Total (Max) Points (C) is calculated by multiplying the Scale/Score (A) by the Weight (B): **A x B = C**

Clause Number	Submission Data
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Clause Number	Submission Data								
	<table> <tr> <th>(EOI) SUBMISSION EVALUATION CRITERIA</th><th>TOTAL (MAX) POINTS (C)</th></tr> <tr> <td><b>1. EXPERTISE OF KEY PERSONNEL - 35 POINTS.</b></td><td></td></tr> <tr> <td><b><u>Breakdown of Points:</u></b></td><td></td></tr> <tr> <td>Contracts Manager possessing a Bachelor Degree or BTech in electrical Engineering and is Registered as a Professional with ECSA with a minimum of 10 + years' experience plus. Attach certified Copy of Qualifications and Profession Registration plus CV. All signed by the owner the qualification.</td><td><b>35</b></td></tr> </table>	(EOI) SUBMISSION EVALUATION CRITERIA	TOTAL (MAX) POINTS (C)	<b>1. EXPERTISE OF KEY PERSONNEL - 35 POINTS.</b>		<b><u>Breakdown of Points:</u></b>		Contracts Manager possessing a Bachelor Degree or BTech in electrical Engineering and is Registered as a Professional with ECSA with a minimum of 10 + years' experience plus. Attach certified Copy of Qualifications and Profession Registration plus CV. All signed by the owner the qualification.	<b>35</b>
(EOI) SUBMISSION EVALUATION CRITERIA	TOTAL (MAX) POINTS (C)								
<b>1. EXPERTISE OF KEY PERSONNEL - 35 POINTS.</b>									
<b><u>Breakdown of Points:</u></b>									
Contracts Manager possessing a Bachelor Degree or BTech in electrical Engineering and is Registered as a Professional with ECSA with a minimum of 10 + years' experience plus. Attach certified Copy of Qualifications and Profession Registration plus CV. All signed by the owner the qualification.	<b>35</b>								

	Contracts Manager possessing a Diploma in Electrical Engineering and with Registration as a Professional with ECSA with a minimum of 10 + years' experience plus. Attach certified Copy of Qualifications and Profession Registration plus CV. All signed by the owner the qualification and cv	<b>25</b>
	None or partial submission of any above or incompatibility with the above categories.	<b>0</b>
	<b>2. RELEVANT PROJECT EXPERIENCE.</b>	
	PROOF OF PROJECTS/EXPERIENCE RELATED TO THE SCOPE OF WORK (COMPLETION CERTIFICATES SIGNED ON A CLIENT LETTERHEAD MUST BE ATTACHED): 32.5 POINTS	
	<b>Breakdown of Points:</b>	
	Service Provider must have completed at least 4 projects. For each, attach a Practical Completion Certificate or written testimonial/confirmation of completion from client or employer with the bid	<b>30</b>
	Service Provider must have completed at least 3 projects. For each, attach a Practical Completion or written testimonial/confirmation of completion from client or employer Certificate with the bid.	<b>25</b>
	Service Provider must have completed at least 2 projects. For each, attach a Practical Completion or written testimonial/confirmation of completion from client or employer Certificate with the bid.	<b>20</b>
	Service Provider with less than 2 projects in any of the above or did not submit Practical completion certificates or still I has projects under construction or not reached completion or incompatible with any of the above categories	<b>0</b>
	<b>3. PROJECT REFERENCE</b>	

	PROOF OF PROJECTS REFERENCES SIGNED BY THE CLIENT MUST BE ATTACHED): 32.5 POINTS	
	✓ Service Provider with 4 references attached – with a stamp and signature of the client, contact details must be clear as this will be verified.	<b>30</b>
	✓ Service Provider with 3 references attached – with a stamp and signature of the client, contact details must be clear as this will be verified.	<b>20</b>
	✓ Service Provider with 2 references attached – with a stamp and signature of the client, contact details must be clear as this will be verified.	<b>10</b>
	✓ Service Provider with 1 reference attached – with a stamp and signature of the client, contact details must be clear as this will be verified.	<b>0</b>
	Registration with relevant associations; SESSA, SAPVIA or ISES	<b>10</b>
		<b>100</b>

**Service Providers are to take note of the following:**

- ✓ Proposed resources/personnel must be employed by the Service Provider at the time of submission, and this assertion must coincide with the employees CV. All qualifications and certificates must be valid and certified.