



BID NUMBER	01.2025 HO
CLOSING DATE AND TIME	FRIDAY, 20 JUNE 2025 STRICTLY AT 12:00PM
DESCRIPTION	BUSINESS DEVELOPMENT SERVICES
NAME OF TENDERER/BIDDER	
CSD NUMBER	
TOTAL BID PRICE (VAT INCLUDED)	
VALIDITY PERIOD OF BID	90 DAYS

**SUBMISSION OF DOCUMENTS**

Sealed tenders, endorsed as indicated in the bid document, must reach **Casidra** SOC Ltd at their Head Office, 22 Louws Avenue, Southern Paarl, placed in the bid box available at Reception.

**FAILURE TO PROVIDE ANY OF THE COMPULSORY DOCUMENTATION AND PARTICULARS MAY RENDER THE BID INVALID.**

**PLEASE NOTE:**

Documents must be bound as **Casidra** will not take responsibility for any information that is lost due to unbound submissions of tenders.

**THE FOLLOWING RETURNABLE DOCUMENTS (INCLUDING THE CBD FORMS AS PART OF THE BID) MUST BE VALID FOR A PERIOD OF 90 CALENDER DAYS AFTER CLOSURE OF THE BID AND SUBMITTED AS PART OF THE BID PACKET**

Document	Description	Compulsory	Comment
CBD 1	Invitation to bid	✓	
CBD 2	Conditions to submit bid	✓	
CBD 3	Terms of Reference	✓	
CBD 4	Pricing schedule	✓	
CBD 5	Supply Chain – Preferential Procurement Regulations 2022 and Codes of good practice	✓	

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<b>Name of bidder</b>				
<b>Postal address</b>				
<b>Street address</b>				
<b>Telephone number (code and number)</b>				
<b>Cellphone number</b>				
<b>Faxcillie number (code and number)</b>				
<b>E-mail address</b>				
<b>VAT registration number</b>				
<b>SARS TCC attached</b> (Foreign suppliers with no tax obligation in South Africa must complete the SBD1 form that will be submitted to SARS for verification and issuing of a Confirmation of Tax Obligation letter.)	<b>YES</b>	<input type="checkbox"/>	<b>NO</b>	<input type="checkbox"/>
<b>Originally certified B-BBEE status level certificate/Original Sworn Affidavit</b> (A B-BBEE status level verification certificate must be delivered to <b>Casidra</b> SOC Ltd, 22 Louws Avenue, Paarl, in order to qualify for preference points for B-BBEE)	<b>YES</b>	<input type="checkbox"/>	<b>NO</b>	<input type="checkbox"/>

<p>I, _____ as the authorised representative of the company / CC / business hereby declare that, to the best of my knowledge the information submitted is true and correct and that I am duly authorized as a signatory of this bid. On behalf of my business, I accept the terms and conditions as set out in this document. I will supply documentary proof of any information supplied herein on request and to the satisfaction of <b>Casidra</b>.</p> <p>In terms of the POPI Act I further give consent that my contact and company details as will be captured on the <b>Casidra</b> database may be shared with the role players/funders involved in the project and be used by <b>Casidra</b> for the purpose of further procurement.</p>			
<b>Signature of bidder</b>		<b>Date</b>	
<b>Capacity under which this bid is signed</b>			

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<b>1. BID SUBMISSION:</b>		
1.1. Bids must be delivered by the stipulated time to the correct address. <b>Late bids will not be accepted.</b> 1.2. All bids must be submitted on the official forms provided (not to be re-typed). 1.3. Bidders must be registered on the Central Supplier Database (CSD). <b>1.4. Original Sworn Affidavit and originally certified B-BBEE certificates must be submitted to bidding institution to qualify for preference points for B-BBEE.</b> 1.5. Bids are subject to the <b>Casidra</b> SOC Ltd Financial Regulations, Preferential Procurement Policy Framework Act and the Preferential Procurement Regulations, 2022, the General Conditions of contract (GCC) where applicable, and if applicable other special conditions of contract.		
<b>2. TAX COMPLIANCE REQUIREMENTS</b>		
2.1. Bidders must ensure compliance with their tax obligations. 2.2. If a discrepancy exists between CSD and SARS, a printed version of the Tax Clearance Certificate (TCC) must be supplied by the supplier and the e-Filing PIN number for verification of authentication by <b>Casidra</b> SOC Ltd. 2.3. Foreign suppliers with no tax obligation in South Africa must complete SBD1 that will be submitted to SARS for verification and the issuing of a Confirmation of Tax Obligation letter. 2.4. Consortia/joint ventures/sub-contractors must each submit a separate TCC.		
<b>3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS</b>		
3.1. Is the bidder a resident of the Republic of South Africa (RSA)	Yes <input type="checkbox"/>	No <input type="checkbox"/>
3.2. Does the bidder have a branch in RSA?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
3.3. Does the bidder have a permanent establishment in the RSA?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
3.4. Does the bidder have any source of income in the RSA?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
<b>IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO OBTAIN A TAX COMPLIANCE STATUS/TAX COMPLIANCE SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 ABOVE.</b>		
<b>4. TENDER CONDITIONS</b>		
<b>CASIDRA reserves the right to:</b> <ul style="list-style-type: none"> <li>disregard any bids where the declaration has not been signed;</li> <li>accept parts of the bid items or split bids based upon item prices;</li> <li>disclose the results of the points awarded on request;</li> <li>evaluate and award points according to the documentation supplied and evaluate functionality at its own discretion;</li> <li>award the bid to the qualifying bidder with the highest number of points scored, unless the prices are not market related or on the basis of objective criteria stated in the tender documents, and</li> <li>to award the bid to a bidder which does not necessarily have the lowest price.</li> </ul>		
<b>The bid may be cancelled if:</b> <ul style="list-style-type: none"> <li>all the bid offers received are higher than R50 million;</li> <li>circumstances change and there is no longer a requirement for this service;</li> <li>funds are no longer available or if there are insufficient funds available in the budget for the work;</li> <li>no acceptable bids and/or market related prices are received;</li> <li>there is a material irregularity in the tender process (administrative non-compliance of prescribed legislation);</li> <li>false information was supplied by the bidder;</li> <li>Cancellation of bid will be placed in the same media as initially advertised.</li> </ul>		
<b>Other notes:</b> <ul style="list-style-type: none"> <li>Final points scored will be rounded off to the nearest 2 decimal places.</li> <li>In the event of equal scores, the offer with the highest B-BBEE score will be successful. If scores are still equal, and where functionality is part of the bid, the offer with the highest functionality score will be successful. If the scores are still equal, the drawing of lots will determine the outcome.</li> <li><b>Casidra</b> SOC Ltd retains the right to amend financial/accounting calculations and to accept the amended amount as the new bid amount.</li> </ul>		

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# FOR OFFICE USE ONLY

PLEASE INDICATE TYPE OF WORKS		
Infrastructure/construction (includes animal husbandry, building, greenhouses, sheds and storerooms, civil and building works including stores, engineering and electrical engineering works)	<input type="checkbox"/>	
Training	<input type="checkbox"/>	
Catering services	<input type="checkbox"/>	
Production inputs (includes feed, fertilizers, packing material, seeds and plants, transport, soil preparation)	<input type="checkbox"/>	
<b>PROFESSIONAL SERVICES (ENGINEERS, CONSULTING ENGINEERS, VETERINARIANS AND SERVICES, LEGAL PRACTITIONERS, INDUSTRIAL CONSULTANTS OR RECRUITMENT AGENCIES, TRAINING SERVICE PROVIDERS, SUBJECT MATTER SPECIALISTS ACTING AS CONSULTANTS, ETC.)</b>	<input checked="" type="checkbox"/>	
Mechanisation (Vehicles, farming implements/equipment)	<input type="checkbox"/>	
Other (please specify)	<input type="checkbox"/>	
PROCUREMENT STRATEGY (Please indicate by choosing either YES or NO and click on the box.)	Yes	No
1. ADVERTISING ON E-TENDER	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Advertising on CIDB	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3. ADVERTISING ON CASIDRA PORTAL	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. RFQ	<input type="checkbox"/>	<input checked="" type="checkbox"/>
5. OPEN TENDER PROCESS	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6. CONTRACT ADMINISTRATION SHEET COMPLETED	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7. PROCURE PLAN SHEET COMPLETED	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
8. ADVERTISE PERIOD: 2 WEEKS <i>*NOTE IF BID DOCUMENT AND ADVERTISEMENT PERIOD IS LESS THAN 14 DAYS, ATTACH CEO APPROVAL.</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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<b>SUPPORTING DOCUMENTATION</b>		
<b>Project managers to indicate what supporting documentation MUST form part of the tender. If marked YES, then it must be provided to SCM:</b>	<b>Yes</b>	<b>No</b>
Baseline Risk Assessment	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Health & Safety plan	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Drawings / sketches	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>COMPULSORY DOCUMENTATION NEEDED TO BE SUBMITTED AS PART OF THIS BID:</b>		
<b>COMPANY PROFILE – DETAILED COMPANY PROFILE INCLUDING CORE BUSINESS ACTIVITIES, BACKGROUND, RESOURCES, CLIENT LIST, SUCCESSFUL PROJECTS, ETC.</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>QUALIFICATIONS – COPIES OF TERTIARY QUALIFICATIONS ACHIEVED (INFORMATION WILL BE VERIFIED) MINIMUM BACHELOR’S DEGREE IN RELEVANT FIELD.</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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<b>BUSINESS DEVELOPMENT SERVICES</b>	
<b>GENERAL REQUIREMENTS</b>	
<p><b>Casidra</b> is seeking a service provider to supply Business Development Services, to drive market expansion, strengthen the organisation’s existing business network, and identify new and diversified funding or income sources to ensure long-term sustainability, for a 1 (one) year period.</p> <p>The successful bidder will be appointed on a monthly retainer and will be required to provide 1 (one) staff member to be on site, at <b>Casidra</b>’s offices in Paarl, 3 (three) days per week, for which <b>Casidra</b> will provide office space only. The bidder will be required to provide all other “tools of the trade”.</p> <p>Project fees will be paid on a negotiated percentage of the project contract value and a separate contract will be signed with the bidder for each project. Project fees do not form part of this bid, but an indication of bidder’s minimum acceptable percentage should be given as a guide as part of the presentation portion of this bid.</p> <p>The top 5 bidders, who have obtained the minimum functional score, will be invited to do a <b>30-minute</b> presentation, which will be scored. The presentation score will form part of the overall score of the bid.</p>	
<b>CONTRACT PERIOD</b>	The contract period of this service is <b>1 (ONE) YEAR</b> starting from the day of appointment.

<b>FUNCTIONAL REQUIREMENTS</b>					
<p><b>Functional refers to:</b> A service or product that is designed to be practical, useful, working or operating, taking into account factors like quality, reliability, viability, and durability and the technical capacity (time and resources) and ability (knowledge and skills) of the bidder to execute the works.</p> <p>An offer that does not obtain the minimum score for each functionality criterion or the minimum weighted average for functionality as indicated, is not an acceptable tender. Is this bid subject to the evaluation of functional requirements? <b>YES (Casidra to indicate)</b></p> <p>If “<b>YES</b>”, the following criteria will be used for evaluation:</p>					
No	Functional criteria	Weight (A)	Score (B)	Minimum score required	Total (A x B)
1	Relevant Experience	40%	For office use	3	For office use
2	References of Previous Relevant Work	20%	For office use	4	For office use
<p><b>STAGE ONE - TOTAL SCORE</b> - A minimum score of <b>66%</b> is required for functional requirements for this bid to be considered for further evaluation</p>				% = Total / 5	For office use

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No	Other criteria	Weight (A)	Score (B)	Minimum score required	Total (A x B)
1	Presentation	40%	For office use	4	For office use
<b>STAGE TWO - TOTAL SCORE</b> - A minimum score of <b>80%</b> is required for functional requirements for this bid to be considered for further evaluation				<b>% = Total / 5</b>	For office use

Functional Item	1 Poor: Non-compliant	2	3	4	5 Excellent: Fully compliant
<b>Relevant Experience</b>	No experience	Less than 5 years' experience	5-years' experience	More than 5-years, but less than 10-years' experience	More than 10-years' experience
<b>References of Previous Relevant work</b>	No references or very poor rapport by most references	Some minor problems experienced by most references	Recommended by most references	Recommended by all references	Highly recommended by all references
<b>Presentation</b>	No Presentation given	Weak presentation with little substance	Good presentation with action plans and timelines but not including all deliverables as requested	Good presentation with action plans and timelines including all deliverables as requested in bid	Excellent presentation with well thought out action plans and timelines

## SCOPE OF WORKS

### 1. PURPOSE / PROBLEM STATEMENT

**Casidra** is seeking Business Development Services to drive market expansion, strengthen the organisation's existing business network, and identify new and diversified funding or income sources to ensure long-term sustainability.

### 2. SCOPE OF WORK / DELIVERABLES

#### Strategic Planning and Business Development

- ✚ Develop and implement a comprehensive business development strategy that aligns to the organisation's vision and strategy.
- ✚ Identify and explore new business opportunities.
- ✚ Create tailored business proposals and project funding applications.

#### Network & Relationship Management

- ✚ Build and maintain strategic relationships with key stakeholders based on mutually beneficial collaboration principles.

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- ✚ Represent Casidra at high-level forums, industry events, and business networking opportunities.
- ✚ Facilitate collaboration with government departments, corporate entities, and community organisations.
- ✚ Actively promote and market the organisation’s capabilities to key stakeholders and clients.

**Proposal Development and Fundraising**

- ✚ Research and identify funding opportunities to enhance the organisation’s financial sustainability.
- ✚ Lead the preparation of compelling proposals, business cases, and funding applications.
- ✚ Oversee the submission process and ensure compliance with funder requirements and timelines.

**Revenue Diversification**

- ✚ Identify innovative income streams to reduce dependency on traditional funding sources.
- ✚ Develop and promote partnerships to create self-sustaining projects with long-term revenue potential.

**Performance Monitoring and Reporting**

- ✚ Develop KPIs and targets for business development initiatives.
- ✚ Track, analyse, and report on progress and outcomes to the CEO and CPO.
- ✚ Ensure proper record-keeping and documentation of all partnerships and proposals.

**Market Research and Analysis**

- ✚ Stay updated on market trends, emerging opportunities, and the competitive landscape.
- ✚ Conduct feasibility studies and risk assessments for proposed projects or initiatives.

It is recommended that only suitably qualified and experienced service providers with at least five (5) years practical experience in their field of expertise apply. The service provider is required to assist **Casidra** to secure projects and funding in the Western Cape Province in line with its mandate: - **Agricultural and Economic Development within a Rural and Land Reform Context**, with special focus on the following areas:

- Renewable Energy
- Agro-Processing
- Aquaculture
- Agricultural Development
- Food Security
- Local Economic and Business Development
- Job Creation Initiatives
- Sustainable Water Management Projects
- Training
- Agri-Hub

The service provider will be required to submit a monthly report to the Chief Executive Officer on all engagements and work done.

The service provider will be expected to work closely with an internal resource to facilitate skills transfer for the duration of the contract.

**3. EXPERIENCE AND QUALIFICATIONS REQUIRED**

The written tender application should focus on the following aspects to qualify and be considered:

- Experience of Business Development, including specialised skills, expertise and value-added services.
  - Proven track record of achieving income targets and growing businesses.
  - Proven ability of building and maintaining business relationships across multiple sectors.
  - Demonstrated experience in writing successful funding proposals and securing financial resources from local and international funders.
  
- Qualifications and experience.
  - Bachelor’s Degree in Business Administration, Economics, Marketing, or a related field.
  - A postgraduate qualification (e.g. MBA or equivalent) will be advantageous.

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- Minimum of 5 years Business Development experience, including successful project funding applications, fundraising, and strategic partnership initiatives that resulted in new income and revenue sources.
- Detailed CV of the Business Developer (and their team, if applicable) who will be responsible for the deliverables – key qualifications and experience to be highlighted and clearly visible.

The bid will be evaluated in two stages. Stage 1 will be evaluated to identify top 5 qualifying bidders. In Stage 2, the top 5 qualifying bidders will be invited to do a **30-minute presentation**, for which they will receive a score towards the overall bid score. The presentation score will carry a weight of 40% and a minimum score of 4 is required.

The presentation must be done by the person who will be onsite for the duration of the contract.

The presentation **must focus** on these points:

- ✚ Qualifications and Expertise.
- ✚ Relevant Experience.
- ✚ Current / Previous Clients and the work done for them.
- ✚ Proposal on how the deliverables of this bid will be achieved. The proposal should include practical steps with realistic timelines.
- ✚ Project fee structure including an indication of minimum project fee percentages

**DO NOT SUBMIT INFORMATION THAT HAS NOT BEEN REQUESTED AS PART OF THIS BID.**

**CLEARLY MARK/HIGHLIGHT INFORMATION PERTAINING TO FUNCTIONAL REQUIREMENTS AS LISTED ABOVE.**

**END OF WORK TO BE DONE**

## TIMELINE

<b><i>ACTION</i></b>	<b><i>START DATE</i></b>	<b><i>END DATE</i></b>	<b><i>DURATION (DAYS)</i></b>
<i>Administrative and tender preparation</i>	<i>26/05/2025</i>	<i>30/05/2025</i>	<i>4</i>
<i>Tender runtime/sourcing of quotes</i>	<i>03/06/2025</i>	<i>20/06/2025</i>	<i>17</i>
<i>Adjudication and award of bid</i>	<i>23/06/2025</i>	<i>07/07/2025</i>	<i>14</i>
<i>Time to activate delivery</i>	<i>08/07/2025</i>	<i>15/07/2025</i>	<i>7</i>
<i>Construction time/delivery completed</i>	<i>28/07/2025</i>	<i>28/07/2026</i>	<i>365</i>
		<i>Total duration</i>	<i>407</i>

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## BID CONDITIONS

### Lump Sum Bid

These documents are for a lump sum bid for all deliverables as set out in the Scope of Works. For the purposes of variation orders, the hourly or unit rates of the services should also be given on the form **CBD 4**.

No unit rate price adjustment of whatever nature, except for decreases or increases in the Value-Added Tax (VAT) will be applicable in this contract. The bidder shall make provision in his bid price for possible fluctuations in costs.

### Expenses in Preparation of Bid

The Client will not be responsible for, subject to the Preferential procurement regulations, nor pay any expenses for losses which the bidder may incur in preparation of this bid.

### Tools & Equipment

The Contractor will provide all his own tools, equipment and transport for this project.

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<b>NOTES (applicable where indicated)</b>	
<b>A. PRICE (where applicable)</b>	
<b>1. FIRM PRICES</b> <ol style="list-style-type: none"> <li>Only firm prices will be accepted.</li> <li>No non-firm prices will be considered.</li> <li>All delivery cost must be included in the bid price for delivery at prescribed destination.</li> <li>In cases where different delivery points influence the pricing, a separate pricing schedule must be submitted for each delivery point.</li> </ol> <b>2. NON-FIRM PRICES</b> <ol style="list-style-type: none"> <li>In cases of period contracts, non-firm prices will be adjusted (loaded) with the assessed contract price adjustments implicit in non-firm prices when calculated the comparative prices.</li> <li>Price adjustments will be allowed at periods and times specified in the bidding documents.</li> <li>In cases where different delivery points influence the pricing, a separate pricing schedule must be submitted for each delivery point.</li> <li>The quantities are given as a guideline for a bid and for the purposes of unit rates and in no way be used as a measured bid.</li> </ol> <b>3. PROFESIONAL SERVICES</b> <ol style="list-style-type: none"> <li>All applicable taxes include value-added tax, pay as you earn, income tax, unemployment insurance contributions and skills development levies.</li> </ol>	
<b>B. CONSTRUCTION (applicable to construction only)</b>	
<ol style="list-style-type: none"> <li>The total price for the service must include all labour and material required for the proper execution of the work as described in the Scope of Works and as per Engineers drawings (where applicable).</li> <li>The tender will be evaluated on the criteria for a market related price.</li> <li>The contractor must attach a <b>detailed and comprehensive</b> proof of competency of a construction manager in terms of Construction Regulations 2014, Clause 8 including experience regarding construction health &amp; safety regulations.</li> <li>The contractor <b>must</b> attach the proof of CIBD grading as specified in the scope of works.</li> <li>The contractor <b>must</b> be in possession of a valid COIDA letter of good standing and it must be attached.</li> <li>Where applicable, the contractor <b>must</b> attach valid proof or registration with the Department of Labour for the installation of the main electrical supply.</li> </ol>	
<b>C. OTHER NOTES (applicable to all bids)</b>	
<ol style="list-style-type: none"> <li>The tender will be evaluated on the criteria for a market related price.</li> <li>The full cost of the service and/or works must be indicated and may not be discounted or cross subsidised against another service, project, transaction or sale of goods. Such contributions against the total project cost must be specified, itemised, costed and clearly indicated in the bid.</li> <li>The prices must be <b>VALID FOR A PERIOD OF 90 DAYS</b> from date of closure of the bid to allow for evaluation and appointment.</li> <li><b>Casidra SOC Ltd</b> retains the right to amend financial/accounting calculations and to accept the amended amount as the new bid amount.</li> </ol>	
<b>D. COMPANY PROFILE (applicable when requested)</b>	
<ol style="list-style-type: none"> <li>The contractor must attach a <b>detailed and comprehensive</b> company profile including <b>core competencies of personnel</b>. The company profile must summarize information about the organisation.</li> <li>The company profile must include the following: <ol style="list-style-type: none"> <li>Company core business activities (describe products and services and markets in which it operates).</li> <li>Company background (state number of years in business, location, history of company etc.)</li> <li>Company resources (number of employees, core competencies of personnel, structure of company)</li> </ol> </li> </ol>	
<b>E. WARRANTY (applicable when requested)</b>	
<ol style="list-style-type: none"> <li>Where requested, the bidder must attach proof of warranty offered on the letterhead of the bidder.</li> </ol>	
<b>F. BROCHURE (applicable when requested)</b>	
<ol style="list-style-type: none"> <li>Bidder must provide detailed brochure and technical specifications of products where requested.</li> <li>Bidder must be able to provide proof of service location within applicable radius as specified in CBD 3 (Scope of works).</li> </ol>	
<b>G. AFTER SALES SERVICES AGREEMENT (applicable when requested)</b>	
<ol style="list-style-type: none"> <li>Where applicable, the bidder must sign and submit the after sales agreement.</li> </ol>	
<b>H. APPOINTMENT (applicable to construction and professional services)</b>	
<ol style="list-style-type: none"> <li>The successful contractor will be given notification in writing by means of an appointment letter</li> <li>The successful contract must sign the <b>CBD 8</b>, together with this document, which will form the contract.</li> </ol>	

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**PROOF OF RELEVANT EXPERIENCE AND REFERENCES**

The following must be completed in detail by bidder.

1. Supply at least **three (3) different references** from **three (3) different companies** with contact numbers.
2. **References to either complete the scoresheet which must be submitted with the bid document or provide the bidder with a reference of which a copy must be attached to the bid document.**
3. Description of work must be relevant to nature of this contract. **Do not list work if it does not fall within the scope of works.**
4. Elaborate on project under Description by being specific at to the works executed in the contract to support relevant experience.

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**REFERENCES PROVIDED BY TENDERER**

Reference company name					
Contact information					
Description of work					
Value of work					
Completed					
<b>Performance of the contractor according below criteria:</b>					
	<b>Poor/bad</b>	<b>Done</b>	<b>Average</b>	<b>Good quality</b>	<b>Excellent</b>
Quality of work					
Project time frame					
Completed within budget					
Overall management of works					
Signed by (Name)					
Signature					
Date					

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**REFERENCES PROVIDED BY TENDERER**

Reference company name					
Contact information					
Description of work					
Value of work					
Completed					
<b>Performance of the contractor according below criteria:</b>					
	Poor/bad	Done	Average	Good quality	Excellent
Quality of work					
Project time frame					
Completed within budget					
Overall management of works					
Signed by (Name)					
Signature					
Date					

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**REFERENCES PROVIDED BY TENDERER**

Reference company name					
Contact information					
Description of work					
Value of work					
Completed					
<b>Performance of the contractor according below criteria:</b>					
	Poor/bad	Done	Average	Good quality	Excellent
Quality of work					
Project time frame					
Completed within budget					
Overall management of works					
Signed by (Name)					
Signature					
Date					

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<b>SUPPLY CHAIN MANAGEMENT</b>		
<b>PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022 AND CODES OF GOOD PRACTICE</b>		
<b>Only for use of bids from R2 000 to maximum of R50 million</b>		
<p><b>Casidra</b>, as a Schedule 3D development and implementation agent for the Western Cape Provincial Government underwrites, and complies with the Provincial and National developmental initiatives and administers funds on behalf of donors. Within this context, and because of the specific requirements of the donors for the application of the funds, the awarding of bids is dependent on the special evaluation criteria as set out in the policies of <b>Casidra</b>. The evaluation criteria of this Preferential Procurement Policy are based on the “<b>Preferential Procurement Policy Framework (Act 5 of 2000)</b>” and related Regulations.</p> <p>Awarding of the bid is dependent on preferential points system, and every presentation is measured against the specific evaluation criteria as shown. <b>The completion and signature of the document is thus a pre-requisite to qualify as a service provider.</b></p>		
<p>This preference form must form part of all bids invited. It contains general information and serves as a claim form for preference points for Broad-Based Black Economic Empowerment (B-BBEE) Status Level of Contribution.</p> <p><b>NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST MAKE SURE OF THE CONTENTS OF THE BROAD BASED BLACK ECONOMIC EMPOWERMENT ACT AND THE CODES OF GOOD PRACTICE WHICH CAN BE FOUND ON:</b>  <a href="http://www.thedtic.gov.za/financial-and-non-financial-support/b-bbee/broad-based-black-economic-empowerment/">http://www.thedtic.gov.za/financial-and-non-financial-support/b-bbee/broad-based-black-economic-empowerment/</a>  <a href="https://www.gov.za/documents/broad-based-black-economic-empowerment-act">https://www.gov.za/documents/broad-based-black-economic-empowerment-act</a>  <a href="https://www.bbbee.commission.co.za/">https://www.bbbee.commission.co.za/</a></p>		
<b>DEFINITIONS</b>		
1.1	“ <b>affidavit</b> ” is a type of verified statement or showing, or in other words, it contains a verification, meaning it is under oath or penalty of perjury, and this serves as evidence to its veracity and is required for court proceedings;	
1.2	“ <b>B-BBEE</b> ” means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;	
1.3	“ <b>B-BBEE status level of contributor</b> ” means the B-BBEE status received by a measured entity based on its overall performance using the relevant scorecard contained in the Codes of Good Practice of Black Economic Empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;	
1.4	“ <b>EME</b> ” is an Exempted Micro Enterprise with an annual total revenue of R10 million or less;	
1.5	“ <b>Large Enterprise</b> ” is any enterprise with an annual total revenue above R50 million;	
1.6	<b>QSE</b> is a Qualifying Small Enterprise with an annual total revenue between R10 million and R50 million;	
1.7	“ <b>the Act</b> ” means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000);	
1.8	“ <b>the Regulations</b> ” means the Preferential Procurement Regulations, 2011 and 2022;	
1.9	“ <b>consortium or joint venture</b> ” 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;	
1.10	“ <b>person</b> ” includes a juristic person;	
1.11	“ <b>sub-contract</b> ” means the primary contractor’s assigning, leasing, making out work to, or employing, another person to support such primary contractor in the execution of part of a project in terms of the contract;	
1.12	“ <b>trust</b> ” means the arrangement through which the property of one person is made over or bequeathed to a trustee to administer such property for the benefit of another person; and	
1.13	“ <b>trustee</b> ” means any person, including the founder of a trust, to whom property is bequeathed in order for such property to be administered for the benefit of another person;	
1.14	“ <b>original sworn affidavit</b> ” means the initial document which was not photocopied or electronically reproduced;	
1.15	“ <b>original certified B-BBEE certificate</b> ” means the certification of a copy of the B-BBEE certificate confirming the validity of the original document. The stamp of the notary must be <b>ORIGINAL</b> .	
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To be initialled by bidder		<i>Initial here</i>

**GENERAL CONDITIONS**

- 1.1 The value of this bid is estimated to **not exceed R50 million** (all applicable taxes included) and therefore the 80/20 points system shall be applicable.
- 1.2 Preference points for this bid shall be awarded for:
- Price; and
  - B-BBEE Status Level of Contribution.
- 1.3 The maximum points for this bid are allocated as follows:

**POINTS**

<b>PRICE</b>	<b>80</b>
<b>B-BBEE STATUS LEVEL OF CONTRIBUTION</b>	<b>20</b>
<b>Total points for Price and B-BBEE</b>	<b>100</b>

- 1.4 Failure on the part of a bidder to fill in, sign this form and submit in the circumstances prescribed in the Codes of Good Practice either a B-BBEE Verification Certificate form issued by a Verification Agency accredited by the South African Accreditation System (SANAS) or by a Registered Auditor approved by the Independent Regulatory Board of Auditors (IRBA) or an affidavit confirming annual total revenue and level of black ownership together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.
- 1.5 The purchaser reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the purchaser.
- 1.6 The bidder is responsible to provide **Casidra SOC Ltd** with (refer to 2.2 under POINTS AWARDED FOR PRICE:
- An **original sworn affidavit**
  - An **originally certified B-BBEE certificate**.

**ADJUDICATION USING A POINT SYSTEM**

- 1.1 Subject to Regulation 7 of the **Casidra SOC Ltd** Financial Regulations and PPR 2022, the bidder obtaining the highest number of total points will be awarded the contract.
- 1.2 Preference points shall be calculated after prices have been brought to a comparative basis taking into account all factors of non-firm prices and all unconditional discounts.
- 1.3 Points scored must be rounded off to the nearest 2 decimal places.
- 1.4 In the event that two or more bids have scored equal total points, the successful bid must be the one scoring the highest number of preference points for B-BBEE.
- 1.5 However, where functionality criterion forms part of the bid and is part of the evaluation process, and two or more bids have scored equal points including equal preference points for B-BBEE, the successful bid must be the one scoring the highest score for functionality.

**POINTS AWARDED FOR PRICE****THE 80/20 PREFERENCE POINT SYSTEM**

1. A maximum of 80 points is allocated for price on the following basis:

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

Where

$P_s$  = Points scored for price of tender under consideration

$P_t$  = Rand value of offer tender consideration

$P_{min}$  = Rand value of lowest acceptable tender

2. A maximum of 20 points will be awarded for B-BBEE status level of contribution:
- 2.1. In terms of Regulations 5(2) of the Regulations preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

B-BBEE Status Level on Contributor	Number of points	Points awarded (for office use only)	BEE recognition level
1	20	EME & QSE 100% Black owned	135%
2	18	EME & QSE 51% + Black	125%
3	14		110%
4	12	EME 51% < Black owned	100%
5	8		80%
6	6		60%

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7	4		50%
8	2		10%
Non-compliant contributor	0		0%

2.2. B-BBEE requirements:

An **EME** must submit a valid, fully completed, **original, certified, dated and signed sworn affidavit** (no photostat copies of certification allowed) confirming annual turnover and level of black ownership or an affidavit issued by Companies Intellectual Property Commission (accounting officer for a Closed Corporation).

If a **startup EME**, a **clear, originally certified copy**, of B-BBEE certificate issued by the CIPC for EME's only is accepted.

A **QSE that is less than 51% (50% or less) black owned** must be verified in terms of the QSE scorecard issued via Government Gazette and submit a **clear, valid, originally certified copy** of a B-BBEE Verification Certificate issued by SANAS.

A **QSE that is at least 51% black owned (51% or higher)** must submit an **original, certified, dated and signed sworn affidavit** confirming turnover and level of black ownership as well as declare its empowering status or an affidavit issued by Companies Intellectual Property Commission.

A **large enterprise** must submit a **clear, valid, originally certified copy** of a B-BBEE Verification Certificate issued by a verification agency accredited by SANAS.

A **trust, consortium or joint venture**, will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their B-BBEE status level certificate.

A **trust, consortium or joint venture** (including unincorporated consortia and joint ventures) must submit a consolidated B-BBEE status level verification certificate for every separate tender.

**Tertiary institutions and public entities** will be required to submit their B-BBEE status level certificates in terms of the specialized scorecard contained in the B-BBEE Codes of Good Practice.

3. Bids of non-compliant contributors (where no certificate was submitted) will be considered but no points will be awarded for B-BBEE status.

**DECLARATION**

Bidders who claim points in respect of B-BBEE status level of contribution **MUST** complete the following:

**1. B-BBEE status level of contributor claimed in terms of paragraph 1 and 2 above:**

B-BBEE status level of contributor:

**2. SUB-CONTRACTING**

2.1. Will any portion of the contract be sub-contracted: Yes  No   
*(Tick applicable box)*

2.2. If YES, INDICATE:

- |   |                              |
|---|------------------------------|
| a. What percentage of contract will be subcontracted? |                              |
| b. The name of the subcontractor                      |                              |
| c. B-BBEE status level of the sub-contractor          |                              |
| d. Is sub-contractor EME or QSE                       | Yes <input type="checkbox"/> |
|   | No <input type="checkbox"/>  |

e. Attach the **originally certified** B-BBEE certificate/**original** sworn affidavit as proof.

**MARKET RELATED PRICING**

If a bidder, whose tender is compliant and received the highest overall points, do not offer a market related price, the offer may be negotiated with that bidder to be market related.

Are you willing to negotiate your offer? Yes  No

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**SUPPLY CHAIN PERFORMANCE MEASUREMENT**

In order for **Casidra** to measure its supply chain efficiency and effectiveness, please assist us by answering the following questions:

- **What were the source that made you became aware of this bid being available.**

Personal Email invite to bid:	<input type="checkbox"/>
Via a friend or business partner:	<input type="checkbox"/>
National Government E-Tender website:	<input type="checkbox"/>
Local Newspapers:	<input type="checkbox"/>
<b>Casidra</b> own website:	<input type="checkbox"/>
CIDB website	<input type="checkbox"/>
Other (specify) .....	<input type="checkbox"/>

- **Was the time allowed to date of closure sufficient for you to compile an offer?**

No – too short <input type="checkbox"/>	Yes – Sufficient <input type="checkbox"/>	No - Too long <input type="checkbox"/>
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I, \_\_\_\_\_

as the authorised representative of the company / CC / business hereby declare that, to the best of my knowledge the abovementioned information is true and correct and that I am duly authorized as a signatory of this bid. On behalf of my business, I accept the terms and conditions as set out in this document. I will supply documentary proof of any information supplied herein on request and to the satisfaction of **Casidra**.

In terms of the POPI Act I further give consent that my contact and company details as will be captured on the **Casidra** database may be shared with the role players/funders involved in the project and be used by **Casidra** for the purpose of further procurement.

<b>Signature</b>	
<b>Date</b>	

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## DECLARATION OF INTERESTS, BIDDERS' PAST SCM PRACTICES AND INDEPENDENT BID DETERMINATION

1. To give effect to the requirements of the Western Cape Provincial Treasury Instructions, 2019: Supply Chain Management (Goods and Services), Practice Note 4 of 2006 Declaration of Bidders Past SCM Practices-(SDB8), Instruction note Enhancing Compliance Monitoring and Improving Transparency and Accountability in Supply Chain Management SBD 4 Declaration of Interest, Practice Note 2010 Prohibition of Restrictive practices SBD9, Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998 as amended together with its associated regulations, the Prevention and Combating of Corrupt Activities Act No 12 of 2004 and regulations pertaining to the tender defaulters register, Paragraph 16A9 of the National Treasury Regulations and/or any other applicable legislation.
2. All prospective bidders intending to do business with this institution must be registered on the central supplier database.
3. Definitions:

“Bid” includes a price quotation, advertised competitive bid, limited bid or proposal

“Bid rigging (or collusive bidding)” occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and / or services for purchasers who wish to acquire goods and / or services through a bidding process. Bid rigging is, therefore, an agreement between competitors

“business interest” means —

- (a) a right or entitlement to share in profits, revenue or assets of an entity;
- (b) a real or personal right in property;
- (c) a right to remuneration or any other private gain or benefit, and includes any interest contemplated in paragraphs (a), (b) or (c) acquired through an intermediary and any potential interest in terms of any of those paragraphs;

“Consortium or Joint Venture” 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;

“employee” means a person employed by the Provincial Government, a provincial public entity or a business enterprise, whether permanently or temporarily, including –

- a) an employee as contemplated in section 8 of the Public Service Act, 1994 (Proclamation 103 of 1994);
- b) a person appointed in terms of section 12A of the Public Service Act;
- c) a person transferred or seconded to the Provincial Government or a provincial public entity in terms of section 15 of the Public Service Act; and
- d) an educator as defined in the Employment of Educators Act, 1998 (Act 76 of 1998), and includes a member of the board or other controlling body of a provincial public entity;

“entity” means any —

- a) association of persons, whether or not incorporated or registered in terms of any law, including a company, corporation, trust, partnership, close corporation, joint venture or consortium; or
- b) sole proprietorship;

“entity conducting business with the Institution” means an entity that contracts or applies or tenders for the sale, lease or supply of goods or services to the Province;

“Family member” means a person’s —

- a) spouse; or

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b) child, parent, brother or sister, whether such a relationship results from birth, marriage or adoption.

“intermediary” means a person through whom an interest is acquired, and includes—

- a) a person to whom is granted or from whom is received a general power of attorney; and
- b) a representative or agent;

“Institution” in this regard means — Casidra SOC Ltd

“Provincial Government Western Cape (PGWC)” means the Institution of the Western Cape, and a provincial public entity;

“spouse” means a person’s:

- a) partner in marriage;
- b) partner in a customary union according to indigenous law; or
- c) partner in a relationship in which the parties live together in a manner resembling a marital partnership or customary union;

4. Regulation 13(c) of the Public Service, 2016, effective 1 February 2017, prohibits any employee from conducting business with an organ of state, or holding a directorship in a public or private company doing business with an organ of state unless the employee is a director (in an official capacity) of a company listed in schedules 2 and 3 of the Public Finance Management Act.
5. The bid of any bidder may be disregarded if that bidder or any of its directors have abused the institution’s supply chain management system; committed fraud or any other improper conduct in relation to such system; or failed to perform on any previous contract.
6. Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging). Collusive bidding is a per se prohibition meaning that it cannot be justified under any grounds.
7. Communication between partners in a joint venture or consortium will not be construed as collusive bidding.
8. 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.

**SECTION A: DETAILS OF THE ENTITY**

<b>A1.</b>	<b>Name of the Entity</b>	
<b>A2.</b>	<b>Entity registration Number (where applicable)</b>	
<b>A3.</b>	<b>Entity Type</b>	
<b>A4.</b>	<b>Tax Reference Number</b>	
<b>A5. Full details of directors, shareholder, member, partner, trustee, sole proprietor or any persons with a right or entitlement to share in profits, revenue or assets of an entity, of the entity should be disclosed in the Table A below.</b>		

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**SECTION C: PERFORMANCE MANAGEMENT AND BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES**

To enable the prospective bidder to provide evidence of past and current performance with the Institution.

C1.	Did the entity conduct business with the Institution in the last twelve months? (If yes complete Table C)	YES	NO
		<input type="checkbox"/>	<input type="checkbox"/>

**C2. Table C**

Complete the below table to the maximum of the last 5 contracts.

NAME OF CONTRACTOR	PROVINCIAL DEPARTMENT OR PROVINCIAL ENTITY	TYPE OF SERVICES OR COMMODITY	CONTRACT ORDER NUMBER	PERIOD OF CONTRACT	VALUE OF CONTRACT

C3.	Is the entity or its principals listed on the National Database as companies or persons prohibited from doing business with the public sector?	NO	YES
C4.	Is the entity or its principals listed on the National Treasury Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No. 12 of 2004)? (To access this Register, enter the National Treasury's website, <a href="http://www.treasury.gov.za">www.treasury.gov.za</a> , click on the icon "Register for Tender Defaulters" or submit your written request for a hard copy of the Register to facsimile number (012) 3265445.)	NO	YES
C5.	If yes to C3 or C4, were you informed in writing about the listing on the database of restricted suppliers or Register for Tender Defaulters by National Treasury?	NO	YES
C6.	Was the entity or persons listed in Table A convicted for fraud or corruption during the past five years in a court of law (including a court outside the Republic of South Africa)?	NO	YES

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**SECTION D: DULY AUTHORISED REPRESENTATIVE TO DEPOSE TO AFFIDAVIT**

The form should be signed by a duly authorized representative of the entity before a commissioner of oaths.

- I, ..... hereby swear/affirm;
- i. that the information disclosed above is true and accurate;
  - ii. that I understand the content of the document;
  - iii. that I have arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor in addition, that there will be no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to the Institution.;
  - iv. that there have been no consultations, communications, agreements or arrangements made with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification o the bid submitted where so required by the institution; and that my entity was not involved in the drafting of the specifications or terms of reference for this bid;
  - v. that I or the representative of the company are aware of and undertakes not to disclose the terms of any bid, formal or informal, directly or indirectly, to any competitor, prior to the awarding of the contract.

.....  
**DULY AUTHORISED REPRESENTATIVE'S SIGNATURE**

I certify that before administering the oath/affirmation I asked the deponent the following questions and wrote down his/her answers in his/her presence:

- 1.1. Do you know and understand the contents of the declaration?  
ANSWER: .....
- 1.2. Do you have any objection to taking the prescribed oath?  
ANSWER: .....
- 1.3. Do you consider the prescribed oath to be binding on your conscience?  
ANSWER: .....
- 1.4. Do you want to make an affirmation?  
ANSWER: .....

I certify that the deponent has acknowledged that he/she knows and understands the contents of this declaration, which was sworn to/affirmed before me and the deponent's signature/thumbprint/mark was place thereon in my presence.

.....  
**SIGNATURE and FULL NAMES**

**Commissioner of Oaths**

Designation (rank)                      ex officio: Republic of South Africa

Date: .....Place .....

**Business Address:** .....

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**If you know of any corrupt, fraudulent or collusive actions in the Institution, please report it by submitting the REPORT FRAUD on the Casidra SOC Ltd website <https://casidra.co.za/report-fraud/>.**

This registration form must be completed annually. Should the information herein declared change in the course of the year or before the next renewal or in relation to any bid, quotation or contract, it is the entity's responsibility to advise the Institution in writing of the change in such details.

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