

PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE GOVERNMENT TECHNICAL ADVISORY CENTRE (GTAC)					
BID NUMBER:	GTAC 013-2023-24	CLOSING DATE:	21 JULY 2023	CLOSING TIME:	11:00AM
DESCRIPTION	FOR THE PROVISION OF LONG-TERM TECHNICAL ADVISORY AND PROJECT MANAGEMENT SERVICES TO GTAC ONE (1) EXPERT: INTER-GOVERNMENTAL RELATIONS (IGR) AND LOCAL GOVERNANCE SUPPORT				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
GTAC TENDER BOX					
240 MADIBA STREET (CORNER THABO SEHUME STREET AND MADIBA STREET), PRETORIA					
NATIONAL TREASURY BUILDING: GOVERNMENT TECHNICAL ADVISORY CENTRE (GTAC)					
GROUND FLOOR, RECEPTION AREA, GTAC TENDER BOX					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Lebakang Mogale		CONTACT PERSON	Lebakang Mogale	
TELEPHONE NUMBER	012 315 5280		TELEPHONE NUMBER	012 315 5280	
FACSIMILE NUMBER	-		FACSIMILE NUMBER	-	
E-MAIL ADDRESS	psp@gtac.gov.za		E-MAIL ADDRESS	psp@gtac.gov.za	
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	☐ Yes ☐ No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?		☐ Yes ☐ No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS					
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?				☐ YES ☐ NO	
DOES THE ENTITY HAVE A BRANCH IN THE RSA?				☐ YES ☐ NO	
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?				☐ YES ☐ NO	
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?				☐ YES ☐ NO	
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?				☐ YES ☐ NO	
IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.					

PART B

TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:
1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED (NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.
1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
1.4. THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).
2. TAX COMPLIANCE REQUIREMENTS
2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
2.6 WHERE NO TCS 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:

TERMS OF REFERENCE

FOR THE PROVISION OF LONG-TERM TECHNICAL ADVISORY AND PROJECT MANAGEMENT SERVICES TO GTAC

ONE (1) EXPERT: INTER-GOVERNMENTAL RELATIONS (IGR) AND LOCAL GOVERNANCE SUPPORT

BACKGROUND INFORMATION

PROGRAMME IDENTIFICATION

Name of Client	Government Technical Advisory Centre (GTAC)
Name of Project	Long-term Advisor: GTAC
Contracting Authority	Government Technical Advisory Centre
Accounting Officer	Ronette Engela Acting Head, Government Technical Advisory Centre (GTAC)
Budget Manager	Emmanuelle Gille Chief Director: Institutional Development Support (IDS), Government Technical Advisory Centre (GTAC)
Project Purpose	GTAC seeks to secure the services of one (1) long-term Public Sector expert, to provide specialist technical assistance in the area of IGR and Local Governance support

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1. BACKGROUND INFORMATION

1.1. Overview

The Government Technical Advisory Centre, or GTAC, seeks a Long-Term Advisor (LTA) to provide specialist technical assistance in the area of Inter-Governmental Relations (IGR) and Local Governance support.

The ideal LTA must be a seasoned advisor with deep, practical, proven, multi-disciplinary experience in IGR and local government and urban development challenges. The LTA will provide technical assistance and advice to GTAC and its client departments on a variety of institutional development support, and related development projects, for the benefit of IGR, local government and local service delivery.

The ideal LTA must also have a relevant post-graduate qualification in public sector management or administration, planning, social science, economics, or other relevant field.

1.2. Introduction

GTAC is a government entity promulgated through a Legal Notice (35194) published in the Government Gazette on 30 March 2012. It is an agency of the National Treasury, established to assist Organs of State in building their capacity for efficient, effective and transparent financial management. The functions of GTAC are:

- To render technical consulting services to Centre of Government Departments and Organs of State;
- To provide specialised procurement support for high-impact government initiatives;
- To render advice on the feasibility of infrastructure projects;
- To provide knowledge management for projects undertaken; and
- Anything ancillary to the functions listed in this subparagraph.

GTAC's Founding Notice indicates that it provides services to its clients, through agreements with the National Treasury, centre-of-government departments and organs of state¹.

GTAC implements its mandate through a client-focused and predominantly project-based approach and collaborates with partners inside and outside government in the development and delivery of its services. More information on the organisation and its work may be found on the GTAC website (www.gtac.gov.za).

1.3. Overview of GTAC

GTAC services encompass several business areas:

¹ Sect. 2 (1) and (2) of the Schedule, Government Notice 261, 30 March 2012.; The Centre of Government Departments are National Treasury, DPME, DPSA and CoGTA

- Institutional Development Support, which delivers services for macro institutional support, organisational strengthening, and service delivery improvement as part of Technical Consulting Services;
- Transaction Advisory Services, which includes support for PPPs;
- Capital Projects Appraisal, which focuses mainly on the appraisal of long-term infrastructure investment plans for National Treasury;
- Performance Expenditure and Policy Analysis;
- The Jobs Fund Project Management Unit; and
- The Municipal Finance Improvement Programme (MFIP) Project Management Unit.

1.4. Overview of Institutional Development Support (IDS)

- The LTA services are primarily sought for the Institutional Development Support (IDS) unit, but not exclusively. This unit provides bespoke public sector advice and technical support to government departments, with a view to building the capacity of government institutions for better financial management and improved service delivery.
- The unit responds to requests from client departments, offering a consulting service delivery model which incorporates innovative approaches to resolving challenges in public sector institutions. It deploys multi-disciplinary teams of advisors to provide quality institutional development and support services, comprising macro-institutional support, organisational strengthening support, and service delivery improvement modalities and approaches, to build the capacity of the state.
- These advisory and technical support services include analysis and development of delivery models, business cases, organisational reviews, diagnostics and feasibility studies, change management, intragovernmental infrastructure delivery support, and programme and project management support.

1.5. Overview of IGR and Local Governance Support in GTAC

GTAC provides support to, and for the benefit of the IGR and local governance and includes a number of partnerships, programmes and projects, across all spheres of government, and with various levels of municipalities and stakeholders including:

- Collaboration with National Treasury's Inter-Governmental Relations division and other core departments.
- Support to the National Treasury's Cities Support Programme (CSP) and other IGR programmes.
- Partnerships with key organisations contributing to the Local Government and sector research institutions.
- Secondary Cities regarding long-term financial planning.
- Local and District Municipalities in terms of institutional strengthening to improve service delivery.

- Other entities addressing local government and/or urban development and/or governance impacting on local service delivery.

GTAC provides programme management, technical advice and/or support, and knowledge management support across the spheres of government in South Africa to enhance local service delivery and intergovernmental relations.

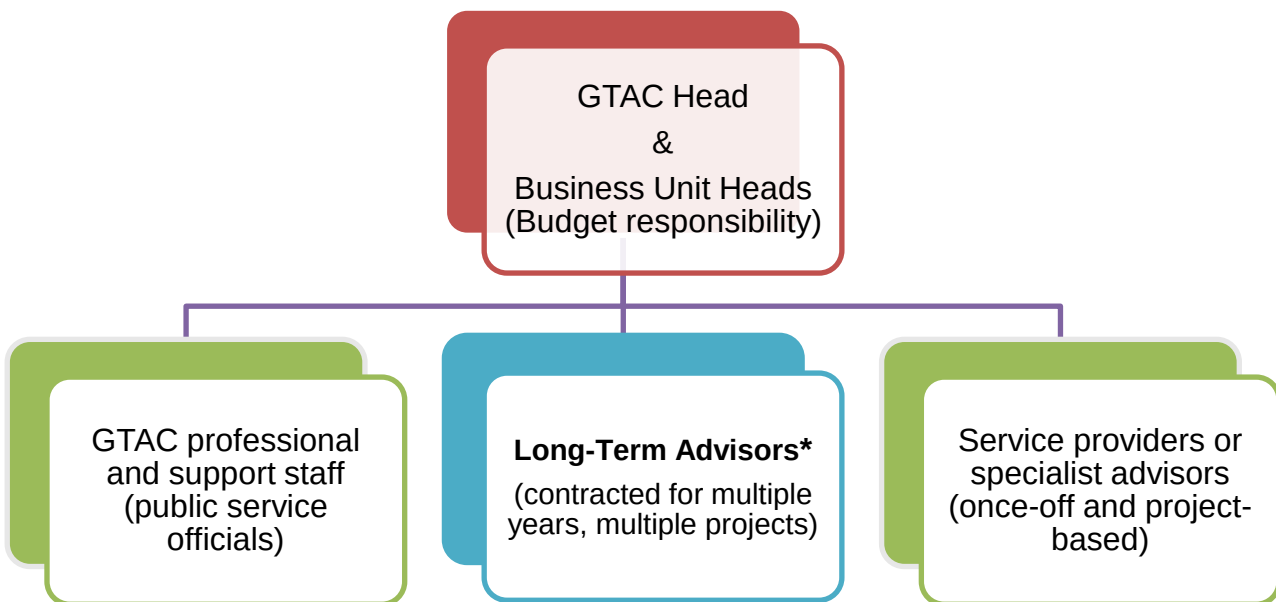
GTAC's support to municipalities, National Treasury and other state entities includes (2019-2024):

- Macro-organisational reviews of municipalities including development of related guidance to municipalities.
- Provision of technical advice and/or support to specific municipalities to improve identified local service delivery challenges.
- Diagnostic reviews of different systems and/or institutions impacting on local service delivery and/or on IGR, such as the local government capacity building system, the system of conditional grants to provinces and local government, etc., across technical and institutional dimensions.
- Programme management support to the Cities Support Programme including strategic guidance (technical, institutional, strategic), procurement support, resource management, creation and management of partnerships, budget preparation and tracking, relationship management, oversight of quality, case study preparation, etc.
- Design and implementation of change and/or other related initiatives arising from research and technical support above.
- Research into specific strategic areas, such as the Centre of Government, District Development Model, provincial and local government infrastructure, municipal policy challenges; this includes the preparation of technical reports and/or case studies.

The LTA must demonstrate experience relevant to the above GTAC portfolio and the stated Main Tasks to be Performed (outlined in Section 4.2 below), be able to work in teams and independently, and must be able to engage with all stakeholders to successfully implement projects like those listed above.

1.6. GTAC Resourcing Model

The GTAC resourcing model is set out in the figure below.



* This is the category of personnel being sought in this Terms of Reference

GTAC Business Unit Heads are officials with budget responsibilities for their defined business areas, who report to the Accounting Officer of GTAC.

GTAC projects are delivered through a combination of officials and a core team of highly skilled technical LTAs who, together, form the basis of the technical expertise in the organisation.

The core team is augmented with skills of service providers contracted for once-off specific assignments. This innovative institutional arrangement allows flexibility to establish suitably experienced teams for each individual project.

1.7. Purpose of this Request for Proposals

GTAC seeks to secure the services of one (1) qualified, skilled and experienced LTA to provide specialist technical assistance for Inter-Governmental Relations (IGR) and Local Governance support.

These terms of reference detail the required expertise, qualifications, skills and experience requirements, scope of work, and the contractual and working arrangements that will apply.

2. REQUIRED EXPERTISE

2.1. Number of Advisors

GTAC intends awarding one contract to an individual with appropriate skills and experience to fulfil the LTA role.

2.2. Qualifications, Skills and Experience

It is anticipated that the LTA will have a relevant post-graduate academic qualification in public sector management or administration, planning, social science, economics, or other relevant field.

The LTA must be a seasoned advisor with ideally 10 years' experience in providing local government and IGR-related advisory support in the public sector. The individual will have deep experience in local government challenges to design and drive institutional support and development projects for the benefit of local government and local service delivery. Proven senior advisory experience is required, as engagements with client representatives and project partners require an ability to interact at various levels of seniority, and advanced communication skills.

Relevant public sector professional experience is required in the following areas: Governance of city administrations including Metropolitan cities and institutional development support, Inter-Governmental Relations policy environment, the Local Government system, and city management, and city development strategy.

3. SCOPE OF THE WORK

3.1. General

The work includes providing technical advice within GTAC and to client departments and other organs of state, including executing GTAC activities and projects to support local government (broadly – local, district, metro) by strengthening related institutions, and convening partnerships and networks for the benefit of local government. It also requires the ability to analyse content, reflect on experience and write case studies and think-pieces at an advanced technical and/or academic level related to the work undertaken for GTAC.

3.2. Main Tasks to be Performed

The following table sets out the activities for each of the above-mentioned competencies:

Competency	Activities / Deliverables	Timeframes
Competency 1: Inter-Governmental Relations (IGR) and Local Governance support	• Technical advice on IGR policy environment, local government system, governance of city administrations, and city management and city development strategy. • Analysis and development of diagnostics, feasibility studies, and technical reviews.	Ongoing and on demand

Competency	Activities / Deliverables	Timeframes
	• Preparation of briefing documents. • Reports and presentations as required by projects. • Management of relationships with major stakeholders in the IGR and local government space.	
Competency 2: Project management and coordination	• Project management processes and documentation related to the above, from conceptualisation to completion. • Development of scope of work, required resources, timeframes, deliverables, risks and risk mitigation strategies, M&E framework. • Preparation of project progress reports (monthly, quarterly and annual versions). • Guidance of multi-disciplinary teams and advise clients on project strategy. • Allocation of resources and procure service providers. • Management of project meetings and coordination. • Management of project closure and all associated activities. • Management and coordination of partnerships (if applicable).	Ongoing and on demand
Competency 3: Contract management	• Management of contracts with service providers and partners. • Monitoring of active contracts. • Review of quality of reports and deliverables.	Ongoing and on demand
Competency 4: Knowledge production and dissemination	• Knowledge production and coordination. • Knowledge dissemination and coordination. • Capacity transfer and shared learning within client system. • Coordination with stakeholders to optimise knowledge dissemination.	As required

4. CONTRACTUAL CONDITIONS

4.1. Appointment Terms

The Service Provider will be contracted by GTAC as an LTA for a period of three (3) years.

- (i) Selection of the LTA will be based on the relevance of their offering in terms of sectors and spheres of government of experience and specialization and competitiveness in terms of hourly and daily rates in line with the maximum rate as specified in par 4.2.
- (ii) LTAs must be willing to work as part of multi-disciplinary teams as appointed and set-up by GTAC.
- (iii) The LTA will report to the relevant GTAC Senior Manager.

- (iv) A dual approval and quality assurance process will be in place for all outputs in respect of the tasks to be performed with sign off required from GTAC and its clients.
- (v) Individual LTA performance will be reviewed annually and linked to project deliverables and will inform the continuation of the contract.
- (vi) Depending on LTA performance, the relevant GTAC Senior Manager will confirm subsequent appointment period at least one (1) month before expiry of the initial period.

The level of effort required from a contracted LTA will depend on GTAC's fluctuating volume of business and the number of project assignments. A maximum of 180 days per annum may be expected of an LTA over the contract period. However, the specific number of days to be contracted will be negotiated with each successful bidder based on GTAC's anticipated needs and the availability of the LTA.

4.2. Maximum Contract Rates and Budget

The professional rates of LTAs are benchmarked against public service senior management service scales, taking into account reasonable adjustments for overhead costs of consultants.

GTAC seeks to appoint one LTA at a maximum rate of R1 250 per hour (including VAT) and R1050 per hour (including VAT) for internal GTAC work.

Internal GTAC work means unfunded work and/or activities commissioned by GTAC for itself. LTAs are remunerated at this reduced rate for internal work.

Lower rates combined with a high degree of experience and skills will increase the competitiveness of the bid. Rates may be adjusted each year to accommodate inflation-related cost of living increases, depending on the availability of funds and at the sole discretion of GTAC.

The indicative maximum budget per year for this contract over an indicative three-year period is:

Indicative maximum budget per year:	
Maximum professional fees	R1,800,000 (maximum 180 days (8 hours) at maximum R1,250 per hour incl. VAT) per annum.

4.3. Location where the Services are Required

GTAC reserves the right to choose where the LTA will work, be it with the provincial, or national sphere of government, or all. The LTA needs to be prepared to undertake a minimal amount of travelling within South Africa.

GTAC does not cover LTA travel and parking costs between place of residence and GTAC offices in Pretoria. The LTA should be flexible to work virtually on MS Teams and Zoom meetings, and through webinars.

4.4. Reporting Requirements

The following reports will be required to be submitted in the pre-agreed formats as material proof of delivery of services:

- Project plans;
- Project progress reports monthly, quarterly and annually in various formats;
- Project close-out reports;
- Ad-hoc reports as may be required by GTAC;
- Close out Report at end of the contract.

Invoices submitted by the Service Provider to GTAC for payment of professional services rendered, will only be approved if accompanied by a timesheet and progress report confirming deliverables and/or deliverables during the period.

4.5. Logistical Support

- The LTA will be responsible for:
 - The provision of any office facilities including computers, telecommunications and stationery and administrative support as required,
 - Own transport and mobile communications.
- All costs of project-related travel will be covered by GTAC.

5. EVALUATION CRITERIA

GTAC has set minimum standards that bidders must meet to be selected as a successful bidder.

5.1. Technical Evaluation Criteria

The technical evaluation of the bid will be based on an assessment of the CV (in the prescribed format provided in **Annexure A**) of the proposed resource (including qualifications, relevant work experience [in number of months/years]; and specific relevant assignments completed (with start and completion date)).

The bid must attain a minimum score of **70%** in order to be considered for Price and Specific Goals evaluation in terms of Preferential Procurement Regulation (PPR)2022. Where deemed necessary by GTAC, further negotiations on rates may be entered into.

The description and the quality criteria, and the maximum possible score for each criterion are shown in the table below:

This matrix will be used to score the proposals:	Scoring	Weight
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A. Relevant Qualifications		
Academic qualification in a public sector management or administration, planning, social science, economics, or other relevant field.	5 = PHD (NQF 9+) 4 = Masters Degree (NQF 9) 3 = Honours Degree / Post-Graduate Diploma (NQF 8) 2 = Degree/ BTech (NQF 7), 1 = Diploma Advanced Certificate (NQF 6) 0 = Non-submission of qualifications / non-submission of SAQA accreditation (where applicable), or non-relevant qualification	10%
B1. Relevant Professional Experience (IGR and Local Governance)		
The service provider must be a seasoned advisor with demonstrated relevant experience as a technical advisor/consultant in the public sector. Relevant professional experience is required in a combination of at least 2 of the following areas: - Governance of city administrations including Metropolitan cities and institutional development support - Inter-Governmental Relations policy environment - Local Government system - City management, and city development strategy	5 = More than 14 years of relevant experience 4 = 11 to 14 years of relevant experience 3 = 10 years of relevant experience 2 = 6 to 9 years of relevant experience 1 = Less than 5 years of relevant experience	40%
B2. Relevant Professional Experience (Project Management and Coordination)		
Relevant professional experience in advanced project management in the public sector context is required and relevant as per Sections 1.5 and 3.2, demonstrated in the following areas: - Project and contract management skills in the public sector context, with the ability to advise on major projects from inception, through to design, implementation and closure. - Experience in producing knowledge outputs such as guidelines or toolkits, practice guidance or learning events.	5 = More than 14 years of relevant experience 4 = 11 to 14 years of relevant experience 3 = 10 years of relevant experience 2 = 6 to 9 years of relevant experience 1 = Less than 5 years of relevant experience	30%
C. Similar Assignments Successfully Completed		
This will be evaluated based on examples of successfully completed assignments or projects in the areas of IGR and local governance related support as per Sections 1.5 and 3.2.	5 = 10 or more successfully completed relevant assignments 4 = 8-9 successfully completed relevant assignments 3 = 6-7 successfully completed relevant assignments 2 = 4-5 successfully completed relevant assignments 1 = 3 or less successfully completed relevant assignments	20%

	0 = non-submission of successfully completed relevant assignments	
Total Technical Threshold		70%
Maximum Score		100%

5.2. Preferential Procurement Evaluation (80/20 Principle)

The applicable formula (80/20) will be utilised to evaluate the bid, of which eighty (80) points are allocated for price as allocated in the enclosed form SBD 6.1. that must be completed. The remaining twenty (20) points are allocated for the specific goals as indicated in the table below:

Number of points allocated (80/20 system)	
Price	80
The specific goals in terms of this tender	20
Above 30% ownership for Historically Disadvantaged Individuals who had no franchise in national elections before the 1983 or 1993 Constitutions.	10
Women percentage of ownership: 30% and above	10
Total	100

Terminology	Definition
Black People	As per the Broad-Based Black Economic Empowerment Act 53 of 2003 as Amended by Act No 46 of 2013 "Black People" is a generic term which means Africans, Coloureds and Indians – (a) who are citizens of the Republic of South Africa by birth or descent; or (b) who became citizens of the Republic of South Africa by naturalisation before 27 April 1994; or II. on or after 27 April 1994 and who would have been entitled to acquire citizenship by naturalization prior to that date.
"specific goals"	means specific goals as contemplated in section 2(1)(d) of the Act which may include contracting with persons, or categories of persons, historically disadvantaged by unfair discrimination on the basis of race, gender and disability including the implementation of programmes of the Reconstruction and Development Programme as published in <i>Government Gazette</i> No. 16085 dated 23 November 1994;
Historically Disadvantaged Individual (HDI)	means a South African citizen: 1. who, due to the apartheid policy that had been in place, had no franchise in national elections prior to the introduction of the Constitution of the Republic of South Africa, 1983 (Act No 110 of 1983) or the Constitution of the Republic of South Africa, 1993, (Act No 200 of 1993) ("the interim Constitution); and/or 2. who is a female; and/or 3. who has a disability. provided that a person who obtained South African citizenship on or after the coming to effect of the Interim Constitution, is deemed not to be an HDI;

6. BID SUBMISSION REQUIREMENTS

A two-stage bidding process will be followed, requiring 2 envelopes:

The 1st envelope must contain the technical proposal and the 2nd envelope must contain the financial proposal (SBD 3.3).

6.1 Administrative Requirements

Bidders must submit all Standard Bidding Documents (SBD), as outlined below.

SBD forms must be completed in full and duly signed where required including Central Supplier Database (CSD) number/report for verification of tax compliance status.

Document to be submitted	Requirement	Non-submission may result in disqualification?
Hard copy proposal delivered to GTAC tender box before closing date and time of the bid	Delivery of a hard copy proposal before the closing date and time.	YES
SBD 1 - Invitation to bid	Complete and sign the supplied pro forma document.	NO
Central Supplier Database (CSD) Registration Report or CSD Registration number or SARS Pin	Bidders must be registered the Central Database System and submit the Report as confirmation of registration at the closing date of the bid.	NO
SBD 4 – Bidder's Disclosure	Complete and sign the supplied pro forma document.	YES
SBD 6.1 – Preferential Claim Form in terms of Preferential Procurement Regulation (PPR) 2022	Complete and sign the supplied pro forma document.	NO
SBD 3.3 - Pricing Schedule	Complete and sign the supplied pro forma document.	YES
Two Envelope system	Technical Proposal and Price Proposal to be submitted separately	YES

6.2 Tax Clearance Status

A valid tax pin must be provided for purposes of verifying that the tax matters of the bidder are in order must be submitted at the closing date and time, where consortium/joint ventures/sub-contractor are involved each party to the association must submit a separate validation of Tax status i.e. Registration number from Central Supplier Database (CSD) must be provided with this bid.

Bidder's tax matters must be compliant at the time of award. In case where a bidder's tax matters are non-compliant a bidder will be given a minimum of seven (7) days to remedy the tax matters. Failure to remedy this will invalidate the bid.

6.3 Mandatory Requirements

Bidders should ensure that the following submission requirements are included in their bids:

6.3.1 CV Template

- 6.3.1.1 The CV of the proposed advisor must be submitted in the prescribed format provided in **Annexure A**.
- 6.3.1.2 Bidders must submit all the information required for evaluation purposes in the CV of the proposed advisor including her/his qualifications, skills and experience; as well as the track record of the advisor in conducting similar assignments.
- 6.3.1.3 CVs of any one individual may only be submitted as part of one bid. Bidders must ensure that CVs are signed by the respective individuals confirming that he/she is not included in bids from other service providers. GTAC reserves the right to confirm with individuals where their names appear in more than one bid.
- 6.3.1.4 CVs from persons in the employment of the state will not be considered.
- 6.3.1.5 Bidder representative (Director/Shareholder/Proposed Resource) must not be employed by the State.

6.3.2 Proof of Qualifications

- 6.3.2.1 Bidders must provide supporting documentation as proof of educational qualifications as well as all required certificates. All copies must be certified and the certification must not be older than six (6) months.
- 6.3.2.2 Please note Certificate of membership shall not be deemed as proof of educational qualification (Education qualifications refers to certifications issued by institution of high learning e.g., Certificate, diploma, degree, etc.)
- 6.3.2.3 Non-submission of qualifications will lead to a score of zero for the qualifications technical criterion (section A of the evaluation criteria).
- 6.3.2.4 All international qualifications must be accompanied by South African Qualifications Authority (SAQA) Accreditation.
- 6.3.2.5 Non-submission of SAQA confirmation will lead to a score of zero for the qualifications technical criterion (section A of the evaluation criteria).

6.3.3 Price proposal

- 6.3.3.1 Submission of a price proposal required (SBD 3.3).
- 6.3.3.2 Bidders need to provide hourly and daily rates, inclusive and exclusive of VAT.

6.3.4 CSD Registration and SBD Forms

- 6.3.4.1 Bidders must be registered on Central Supplier Database (CSD) on the closing date of the tender.
- 6.3.4.2 Bidder's must submit the attached SBD 4 document. A bid will be disqualified if this disclosure is found not to be true and complete in every respect. The following definitions should be considered when completing the form:
- "Person" means a bidder or supplier or shareholder, director, trustee, partner, member of a bidder or supplier having the controlling interest in the bidder or supplier.
- "State" means a national or provincial department, national or provincial public entity or constitutional institution, a municipality or municipal entity, a provincial legislature or parliament.

Failure by a bidder to comply with the above minimum requirements will result in such Bidder's proposal not being evaluated further.

7. BID VALIDITY PERIOD

The bid will be valid for a period of 90 (ninety) days from the closing date of the bid.

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

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

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

2. Bidder's declaration

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

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

Full Name	Identity Number	Name of State institution

2.2 Do you, or any person connected with the bidder, have a relationship

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

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:

.....

3 DECLARATION

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

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring

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

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

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 To be completed by the organ of state

- a) The applicable preference point system for this tender is the **80/20** preference point system.
- b) **80/20 preference point system** will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price; and
- (b) Specific Goals.

1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	100

1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

- 1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

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

80/20

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

Where

- Ps = Points scored for price of tender under consideration
- Pt = Price of tender under consideration
- Pmin = Price of lowest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:

- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
 - (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,
- then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

Table 1: Specific goals for the tender and points claimed are indicated per the table below.

(Note to organs of state: 80/20 preference point system is applicable, corresponding points must also be indicated as such.)

Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)

Failure to claim points on this section or non-submission of evidence would result in a score of 0.

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Above 30% ownership for Historically Disadvantaged Individuals who had no franchise in national elections before the 1983 or 1993 Constitutions.	10	
Women percentage of ownership: 30% and above	10	
Total	20	

NB* Bidders may refer to paragraph 5.2 of the Terms of Reference (ToR) for preferential procurement evaluation.

DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name of company/firm.....

4.4. Company registration number:

4.5. TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One-person business/sole propriety
- ☐ Close corporation
- ☐ Public Company
- ☐ Personal Liability Company
- ☐ (Pty) Limited
- ☐ Non-Profit Company
- ☐ State Owned Company

[TICK APPLICABLE BOX]

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 - (a) disqualify the person from the tendering process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution, if deemed necessary.

.....
SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME:

DATE:

ADDRESS:

.....
.....

PRICING SCHEDULE**(Professional Services)**NAME OF BIDDER: **GTAC 013-2023-24****CLOSING DATE AND TIME: 21 JULY 2023 AT 11:00 AM**

OFFER TO BE VALID FOR 90 DAYS FROM THE CLOSING DATE OF BID.

ITEM NO	DESCRIPTION	BID PRICE IN RSA CURRENCY INCLUSIVE OF **ALL APPLICABLE TAXES
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GTAC 013-2023-24: FOR THE PROVISION OF LONG-TERM TECHNICAL ADVISORY AND PROJECT MANAGEMENT SERVICES TO GTAC ONE (1) EXPERT: INTER-GOVERNMENTAL RELATIONS (IGR) AND LOCAL GOVERNANCE SUPPORT

- Services must be quoted in accordance with the attached Terms of Reference (ToR).
- All prices quoted **must** be inclusive of all applicable taxes, if no indication is given, prices will be evaluated as all-inclusive.

Name of proposed Expert	LTA Rate per hour		Rate per hour for Internal GTAC work	
	Hourly rate (Exclusive of all applicable taxes)	Hourly rate (Inclusive of all applicable taxes)	Hourly rate (Exclusive of all applicable taxes)	Hourly rate (Inclusive of all applicable taxes)
	R	R	R	R

- The financial proposal for this assignment should cover for all assignment activities as per the ToR.
- Period required for commencement with project after acceptance of bid _____
- Are you a VAT vendor? Yes/No
- Are the rates quoted firm for the full period? Yes/No
- If not firm for the full period, provide details of the basis on which adjustments will be applied for, for example consumer price index.

Any enquiries regarding this Request for Bid (RFB) procedures may be directed to: psp@gtac.gov.za

** "all applicable taxes" includes value- added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies.