

<b>RFQ TITLE</b>	<b>ASSET REGISTER MANAGEMENT SYSTEM</b>
<b>RFQ NUMBER</b>	<b>RFQ202324-R0044</b>
<b>DATE ISSUED</b>	<b>Friday, 29 September 2023</b>
<b>CLOSING DATE</b>	<b>Tuesday, 17 October 2023</b>
<b>CLOSING TIME</b>	<b>11h00 (South African Standard Time, obtained from Telkom SA SOC Limited by dialling 1026)</b>
<b>PHYSICAL ADDRESS</b>	<b>Menlyn Central Office Building, 11th Floor 125 Dallas Avenue, Waterkloof Glen, Pretoria, 0010</b>
<b>POSTAL ADDRESS</b>	<b>P O Box 41, Menlyn Park, 0063 Switchboard: +27 12 762 5000</b>
<b>WEBSITE</b>	<b><a href="http://www.faisombud.co.za">www.faisombud.co.za</a></b>

ENQUIRIES RELATING TO REQUEST FOR QUOTATION		
	Click or tap here to enter text.	
<b>Email</b>	<a href="mailto:supplychain@faisombud.co.za">supplychain@faisombud.co.za</a>	

**Call 0800 114 711 to anonymously report incidences of fraud at the FAIS Ombud**

Fairness in Financial Services: Pro Bono Publico

Menlyn Central Office Building, 125 Dallas Avenue, Waterkloof Glen, Pretoria 0010  
P O Box 41, Menlyn Park, 0063  
Phone: (012) 762 5000; Fax: (012) 348 3447 / (012) 470 9097 Sharecall 086 066 3274  
[www.faisombud.co.za](http://www.faisombud.co.za)

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## A. INTRODUCTION TO REQUEST FOR QUOTATION (RFQ)

### 1. Introduction

- 1.1 The Office of the Ombud for Financial Services Providers (FAIS Ombud) was established by the Financial Advisory and Intermediary Services Act 37 of 2002. The FAIS Ombud's role is to resolve disputes between financial services providers and their clients in a procedurally fair, informal, economical and expeditious manner and by reference to what is equitable in all circumstances.
- 1.2 The mission of the FAIS Ombud is to promote consumer protection and contribute to the integrity of the financial services industry by resolving complaints in a manner that is impartial, expeditious, economical, accessible and, all times, equitable. Visit the FAIS Ombud website, [www.faisombud.co.za](http://www.faisombud.co.za) for further information about the FAIS Ombud.
- 1.3 The FAIS Ombud office is located in the East of Pretoria in Gauteng at Menlyn Central Office Building, 125 Dallas Avenue, Waterkloof Glen, Pretoria 0010
- 1.4 This RFQ is subject to the Preferential Procurement Policy Framework Act No. 5 of 2000 and the Preferential Procurement Regulations, 2022, the General Conditions of Contract (GCC) and, if applicable, any other special conditions of contract. Where, however, the special conditions of the contract are in conflict with the general conditions of the contract, the special conditions of the contract prevail.
- 1.5 All information, including personal information collected during this process will be treated as confidential, and processed in line with the FAIS Ombud Protection of Personal Information Policy.
- 1.6 The FAIS Ombud is inviting quotations from potential service providers for the services outlined below:

<b>DESCRIPTION OF GOODS/SERVICES:</b>	Provision of Asset Register Management System
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### 2. RFQ submission

- 2.1 Quotations and supporting documents shall be submitted to the following email address: [supplychain@faisombud.co.za](mailto:supplychain@faisombud.co.za)
- 2.2 RFQ documents will only be considered if received by the FAIS Ombud on or before the closing date and time.
- 2.3 **Late submissions will not be accepted.**
- 2.4 Service providers must initial each page of the RFQ document on the bottom right-hand corner.

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### **3. Request for Quotation (RFQ) rules**

3.1 The following rules will apply for this Request for Quotation:

- 3.1.1 Price(s) quoted must be valid for 60 days from the closing date.
- 3.1.2 Price(s) quoted must be firm and must be inclusive of Value Added Tax (VAT) where applicable.
- 3.1.3 Price(s) quoted must be comprehensive, the bidder should take into consideration all the cost factors and provide composite pricing and it must be in South African Rand.
- 3.1.4 Potential supplier/service provider must be validly registered on the Central Supplier Database (CSD) as hosted by National Treasury.
- 3.1.5 Payment will be processed upon submission of a valid invoice and acceptance of services rendered by the Project Manager.
- 3.1.6 The FAIS Ombud reserves the right to negotiate the price with the appointed service provider.

## B. TERMS OF REFERENCE

### 4. Terms of reference

- 4.1 The purpose of this request is to extend the invitation to service providers to submit quotations for the provision of an asset register management system, including **support and maintenance** services as and when required, for a period of three years. The appointed service provider will be responsible for **supplying and installing the asset register management system**, as well as offering **training** to relevant staff members regarding its usage.
- 4.2 The FAIS Ombud is yet to decide on whether to host the solution on premise or have it hosted on the cloud. Service providers are therefore requested to provide their quotations for on premise and/or cloud hosting. For on premise solution, service providers are requested to provide ICT hardware requirements (**but not cost the ICT hardware requirements as the FAIS Ombud will purchase those**).
- 4.3 The appointed service provider is expected to migrate data from current Assetware Manager Enterprise Version 1.4 release 10 to the proposed asset management system.

### 5. Background

- 5.1 The FAIS Ombud is currently using Assetware Manager Enterprise Version 1.4 release 10 which is currently being phased out and is no longer supported, hence we are looking for a supplier to supply and install an asset register management system. The Finance Department is currently utilising Sage 300 as its core accounting system and the proposed system must be compatible to integrate into this system.

### 6. Scope of work

- 6.1 The service provider will be required to provide an asset register management system that possesses the capability to perform the following functions:

Normal Processing of transactions	
1	Capture fixed asset additions with all the following fields <ul style="list-style-type: none"> <li>a. Description</li> <li>b. Supplier</li> <li>c. Addition date</li> <li>d. Invoice number</li> <li>e. Invoice date</li> <li>f. Invoice amount</li> <li>g. Insured amount</li> <li>h. Number of units</li> <li>i. Location of the asset</li> <li>j. Depreciation variables, i.e. rate, term, method, change remaining term</li> <li>k. Serial numbers</li> </ul>
2	Reassessment of useful lives <ul style="list-style-type: none"> <li>a. Changes in estimates of depreciation variables (change remaining useful life) at a reporting date</li> </ul>

- |   |  |
|---|--|
| 3 | Import data into the system <ul style="list-style-type: none"> <li>a. Asset additions data</li> <li>b. Physical asset verification data, etc.</li> </ul> |
|---|--|

#### Controls Imbedded in the System

1	User Profiles <ul style="list-style-type: none"> <li>a. Super-user to create profiles and allocate rights</li> </ul>
2	Transaction logs <ul style="list-style-type: none"> <li>a. Super-user to be able to access logs of activity by user</li> </ul>
3	Electronic filing <ul style="list-style-type: none"> <li>a. Invoices and Purchase Orders to be uploaded directly onto the system</li> </ul>
4	Assets additions should be sequentially numbered
5	Support a scanner for the purpose of asset verification

#### Seamless integration with SAGE 300 Accounting System

1	The system should integrate with Sage 300 for ease of: <ul style="list-style-type: none"> <li>a. Processing depreciation journals</li> <li>b. Processing disposals or additions</li> </ul>
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#### Financial Reporting

1	Generate reports <ul style="list-style-type: none"> <li>a. Class totals reports             <ul style="list-style-type: none"> <li>i. Summarized asset totals per asset class at a reporting date</li> </ul> </li> <li>b. Detailed asset register with:             <ul style="list-style-type: none"> <li>i. Asset class</li> <li>ii. Purchase date</li> <li>iii. asset code</li> <li>iv. cost</li> <li>v. accumulated depreciation</li> <li>vi. and carrying amount</li> <li>vii. Reporting period</li> </ul> </li> <li>c. Disposal reports with             <ul style="list-style-type: none"> <li>i. disposal date,</li> <li>ii. customer,</li> <li>iii. invoice number,</li> <li>iv. description</li> <li>v. proceeds on disposal</li> <li>vi. profit / loss on disposal</li> </ul> </li> <li>d. Asset additions reports with             <ul style="list-style-type: none"> <li>i. purchase date,</li> <li>ii. supplier,</li> <li>iii. invoice number</li> <li>iv. description</li> <li>v. amount</li> </ul> </li> <li>e. Location reports with:             <ul style="list-style-type: none"> <li>i. asset description,</li> <li>ii. asset code,</li> <li>iii. carrying amount</li> <li>iv. current location</li> </ul> </li> <li>f. Other customized reports –             <ul style="list-style-type: none"> <li>i. system should allow users to add a customized report</li> </ul> </li> <li>g. Provide reports in             <ul style="list-style-type: none"> <li>i. PDF and</li> <li>ii. MS Excel</li> </ul> </li> </ul>
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#### Other System Features

	Perform an easy search of asset registers by: <ul style="list-style-type: none"> <li>a. Asset code, and / or</li> <li>b. Description, and / or</li> <li>c. Serial number, and/or</li> <li>d. Bar code</li> </ul>
--	--

- 6.2 The service provider will be required to migrate the current data from Assetware Management to the new solution, the database size in total is 1GB.
- 6.3 The supplier must provide support and maintenance as and when required for a period of 3 years.
- 6.4 The service provider will be required to facilitate the licenses renewal on an annual basis for the system to function.
- 6.5 The appointed service provider must provide a once-off training for the below users.

**Table 1**

DESCRIPTION	QUANTITY
System administrator	1
Super user	1
Normal users (limited access)	4
<b>Total</b>	<b>6</b>

## **7. Contract conditions**

The service provider shall be required to furnish the FAIS Ombud with the following:

### **7.1 Data migration:**

- 7.1.1 The service provider is required to outline their general approach towards data migration. Furthermore, they should back up the current data from the Assetware Manager System. The data migration approach should be structured according to the following stages:
- 7.1.1.1 Data migration strategy.
  - 7.1.1.2 Data migration activities.
  - 7.1.1.3 Testing approach.

### **7.2 Training plan:**

- 7.2.1 The training plan must provide a detailed training methodology and approach, including user training manuals and guides, and ensure that the transfer of knowledge to the FAIS Ombud users occurs.

### **7.3 Project plan:**

- 7.3.1 The service provider must provide a detailed project plan that includes the following:
- 7.3.1.1 The duration and milestone of the total project Solution delivery,
  - 7.3.1.2 Weekly project status/Project progress meetings.

#### 7.4 **Project times lines:**

7.4.1 The service provider is responsible for implementing the functional solution, and hand-over the solution within a period of four (4) weeks upon receiving a purchase order from the FAIS Ombud. The timeframe encompasses testing, data migration, and training.

#### 7.5 **Support and maintenance:**

7.5.1 The service provider is required to provide support and maintenance to the FAIS Ombud as and when required for a period of three years. While remote support can be utilized, onsite support must be provided in cases where requests cannot be resolved remotely. The service provider will invoice the FAIS Ombud based on the actual hours of support provided, using a rate-per-hour as per the quote.

### 8. **Request for quotation evaluation**

8.1 The proposals will be evaluated as follows.

#### 8.1.1 **Evaluation Stage One: Compliance**

Compliance with administrative requirements stated in the Standard Bidding Documents and the mandatory requirements as listed in paragraph 12. In this evaluation stage, all bidders who fail to provide the required information and documentation will be disqualified from further evaluation.

#### 8.1.2 **Evaluation Stage Two: Functional evaluation (Desktop evaluation)**

In this evaluation stage, bidders are expected to obtain a minimum of 70 out of 100 points to proceed to the next evaluation stage of the evaluation. Failure to obtain the prescribed minimum points will automatically disqualify the bid offer from proceeding to the next evaluation stage.

#### 8.1.3 **Evaluation Stage Three: Functional evaluation (Presentation)**

In this evaluation stage, bidders are expected to obtain a maximum of 100 points to proceed to the next evaluation stage of the evaluation. Failure to obtain the prescribed minimum points will automatically disqualify the bid offer from proceeding to the next evaluation stage.

#### 8.1.4 **Evaluation Stage Four: Preference Point System**

The 80/20 preference point system shall be applicable to this stage, where 80 points represent the maximum obtainable points for the lowest acceptable price, and 20 points represent the specific goals in accordance with the table as listed in the bid documentation.

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**9. Functional evaluation (Asset Registers Management System)**

9.1 The bid/proposal will be evaluated for functionality and be rated as follows:

**Values:** 0=Poor 1=Below average, 2=Average, 3=Good, 4=Very Good, 5=Excellent

**Table 2**

ITEM	DESCRIPTION	EVALUATION CRITERIA	RATING	WEIGHT
1. Experience	<p>1.1 The service provider must provide a Curriculum Vitae (CV) of each project team member outlining their experience and expertise to effectively support and maintain the asset register management system.</p> <p>Each member of the project team should have a minimum of three (3) years of experience in supporting and maintaining the asset register management system, which should be clearly evident in their CVs.</p>	1.1.1 The CV has either not been submitted or the submitted CV does not demonstrate the required experience.	0	50
		1.1.2 Less than three CVs of project team members are submitted with three years of experience in support and maintenance of asset register management system.	2	
		1.1.3 Three CVs of project team members submitted with three years of experience in support and maintenance of asset register management system.	3	
		1.1.4 Four CVs of project team members submitted with three years of experience in support and maintenance of asset register management system.	4	
		1.1.5 Five CVs of project team members submitted with three years of experience in support and maintenance of asset register management system.	5	

		management system. management systems.		
2. Project plan proposal	2.1 A project plan containing details of the proposed approach must be provided. The plan should encompass various aspects including but not limited to:  2.1.1 The project plan clearly defines targets and timelines 2.1.2 Support and maintenance plan 2.1.3 Skills transfer plan	2.1.1 No project plan has been provided or project plan which has been provided encompassing none of the listed points	0	50
		2.1.2 A project plan has been submitted encompassing one point of (2.1.1) to (2.1.3)	3	
		2.1.3 A project proposal has been submitted encompassing 2 points of (2.1.1) to (2.1.3)	4	
		2.1.4 A project plan has been submitted encompassing (2.1.1) to (2.1.3) points and more.	5	
		TOTAL		

## 10. Functional evaluation (Presentation)

10.1 Functionality criteria on the presentation to the FAIS Ombud by short-listed bidders is as follows:

**Values:** 1=Poor 2=Below average, 3=Average, 4=Good, 5=Very Good

**Table 3**

ITEM	EVALUATION CRITERIA	DESCRIPTION	POINTS ALLOCATION		WEIGHT
			DETAILED DESCRIPTION	RATING	
	1. Data migration plan	1.1 The plan should outline data migration and backup strategy.	1.1.1. No plan has been provided or the submitted plan does not outline data migration and backup strategy.	0	50
			1.1.2. The provided plan outlines how data will be backed up and migrated from the current system to the newly proposed solution.	5	
	2. Understanding the scope of work	2.1 The proposed solution should be compatible and be able to integrate with Sage 300.	2.1.1 The proposed solution falls short in terms of essential features. It lacks comprehensive asset capture, document upload functionality, reassessment of asset useful lives, and scanner support for physical asset verification, and fails to meet the required level of reporting capabilities. Additionally, user profiles with varying access rights are not adequately addressed.	0	50
		2.2 The proposed solution should encompass essential features, including asset capture, document uploads, reassessment of asset useful			

		<p>lives, scanner support for physical asset verification, robust reporting capabilities, and user profiles with customizable access rights.</p> <p>2.3 Additionally, the proposed solution should generate the following reports:</p> <p>2.3.1 A detailed asset report including cost, additions, disposals, closing balance, accumulated depreciation, depreciation, and net book value (NBV).</p> <p>2.3.2 Summarized asset report per asset class.</p> <p>2.3.3 Disposal report</p> <p>2.3.4 Customized reports, such as additions reports within specified date range</p>	<p>2.1.2 The proposed solution encompasses essential features, including asset capture, document uploads, reassessment of asset useful lives, scanner support for physical asset verification, robust reporting capabilities, and user profiles with customizable access rights. Additionally, the system is equipped to generate comprehensive reports as specified in 2.3.1 to 2.3.4.</p>	5	
<b>TOTAL</b>					<b>100</b>

## 11. Preference point system

### 11.1 General Conditions.

11.1.1 The applicable preference point system for this request for quotation is 80/20 preference point system.

11.1.2 The maximum points for this tender are allocated as follows:

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

11.2 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.

11.3 The organ of state reserves the right to require 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.

### 11.4 Formulae for procurement of goods and services

#### 11.4.1 Points awarded for price

##### 11.4.1.1 The 80/20 Preference Point Systems

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

**80/20**

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

Where

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

$P_t$  = Price of tender under consideration

$P_{min}$  = Price of lowest acceptable tender

## 11.5 Points awarded for specific goals

11.5.1 The applicable preference points for this tender is 80/20. While 80 will be allocated for price and 20 for specific goals indicated in table 5 below.

**Table 4**

SPECIFIC GOALS ALLOCATED POINTS	80/20 PREFERENCE POINTS ALLOCATED	PROOF OF CLAIM FOR A SPECIFIC GOAL
≥ 51% black owned	10	BEE Certificate/Sworn Affidavit/Latest CSD report
≥ 31 % black women-owned	6	BEE Certificate/Sworn Affidavit/Latest CSD report
QSE or EME	4	BEE Certificate/Sworn Affidavit/Latest CSD report
<b>Total</b>	<b>20</b>	

## 12. Additional information required

12.1 The following compulsory additional information is required. Failure to complete and supply any of these documents will lead to disqualification of this bid

**Table 5**

ELIGIBILITY/MANDATORY REQUIREMENT	COMPLY	NOT COMPLY
(i) Proof of registration on the National Treasury Central Supplier Database with a compliant tax status		
(ii) Submission of completed SBD 1		
(iii) Submission of completed SBD 3.1		
(iv) Submission of completed SBD 4		
(v) Submission of completed SBD 6.1		
(vi) Submission of quotation		
(vii) The service provider must submit three (3) reference letters from clients where they have successfully implemented and provided support and maintenance on the asset register management system within the last 3 years from the closing date of the bid.		

The year in which implementation, support and maintenance was provided must be indicated in the letter *(in case where reference letter does not indicate the date on which implementation, support, and maintenance was provided on the asset register management system, the award letter or purchase order must be provided together with the reference letter)*.

### 13. Annexure 1: Pricing

13.1 Bidders are required to provide a detailed pricing schedule for all services proposed. The quotation must align with the table below.

#### HOSTED PROPOSAL

DESCRIPTION			TOTAL COST (INCLUDING VAT)
<b>Deployment Costs</b>			
Software cost (Year one)			
Professional service (System implementation, data migration, etc.)			
Training costs			
<b>Post-Deployment Costs</b>	<b>YEAR 1</b>	<b>YEAR 2</b>	<b>YEAR 3</b>
Support and maintenance (Hourly rates inclusive of VAT)			

#### CLOUD PROPOSAL

DESCRIPTION			TOTAL COST (INCLUDING VAT)
<b>Deployment Costs</b>			
Software cost (Year one)			
Professional service (System implementation, data migration etc.)			
Training costs			
<b>Post-Deployment Costs</b>	<b>YEAR 1</b>	<b>YEAR 2</b>	<b>YEAR 3</b>
Support and maintenance (Hourly rates inclusive of VAT)			

13.2 Only fixed prices will be accepted.

**C. STANDARD BIDDING DOCUMENT**

**Standard Bidding Document (SBD 1)**

**PART A**

**INVITATION TO BID**

<b>YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)</b>				
BID NUMBER:	RFQ2023/23 - R0044	CLOSING DATE:	17 OCTOBER 2023	CLOSING TIME:
DESCRIPTION	<b>ASSET REGISTER MANAGEMENT SYSTEM</b>			
<b>BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)</b>				
MENLYN CENTRAL OFFICE BUILDING, 11 <sup>TH</sup> FLOOR				
125 DALLAS AVENUE				
WATERKLOOF GLEN				
PRETORIA, 0010				
<b>ALL QUESTIONS RELATING TO THE CONTENTS OF THE TENDER (CONDITIONS, RULES, TERMS OF REFERENCE ETC.) MUST BE FORWARDED IN WRITING VIA EMAIL TO TENDERS@FAISOMBUD.CO.ZA</b>				
<b>SUPPLIER INFORMATION</b>				
NAME OF BIDDER				
POSTAL ADDRESS				
STREET ADDRESS				
TELEPHONE NUMBER	CODE		NUMBER	
CELLPHONE NUMBER				
FACSIMILE NUMBER	CODE		NUMBER	
E-MAIL ADDRESS				
VAT REGISTRATION NUMBER				
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:
				MAAA



ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]	ARE YOU A FOREIGN-BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
<b>QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS</b>			
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?		<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE A BRANCH IN THE RSA?		<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?		<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?		<input type="checkbox"/> YES <input type="checkbox"/> NO	
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?		<input type="checkbox"/> YES <input type="checkbox"/> NO	
<p><b>IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.</b></p>			

## PART B TERMS AND CONDITIONS FOR BIDDING

<b>1. BID SUBMISSION:</b>
1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.  1.2. <b>ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED (NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.</b>  1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.  1.4. <b>THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).</b>
<b>2. TAX COMPLIANCE REQUIREMENTS</b>
2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.  2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.  2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.  2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.  2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.  2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.  2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

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

SIGNATURE OF BIDDER: .....

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

DATE: .....

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**Standard Bidding Document (SBD 3.1)**

**PRICING SCHEDULE – FIRM PRICES  
(PURCHASES)**

**NOTE:** ONLY FIRM PRICES WILL BE ACCEPTED. NON-FIRM PRICES (INCLUDING PRICES SUBJECT TO RATES OF EXCHANGE VARIATIONS) WILL NOT BE CONSIDERED

IN CASES WHERE DIFFERENT DELIVERY POINTS INFLUENCE THE PRICING, A SEPARATE PRICING SCHEDULE MUST BE SUBMITTED FOR EACH DELIVERY POINT

Name of bidder.....	Bid number.....
Closing Time 11:00	Closing date.....

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

ITEM NO.	QUANTITY	DESCRIPTION	BID PRICE IN RSA CURRENCY ** (ALL APPLICABLE TAXES INCLUDED)
----------	----------	-------------	---

Required by:.....

At:.....

.....

Brand and model:.....

Country of origin:.....

Does the offer comply with the specification(s)? \*YES/NO

If not to specification, indicate deviation(s).....

Period required for delivery.....

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\*Delivery: Firm/not firm

Delivery basis .....

Note: All delivery costs must be included in the bid price, for delivery at the prescribed destination.

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

\*Delete if not applicable

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## DECLARATION OF INTEREST

1. Any legal person, including persons employed by the state<sup>1</sup>, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes a price quotation, advertised competitive bid, limited bid or proposal). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where-
  - the bidder is employed by the state; and/or
  - the legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.
2. **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**
  - 2.1 Full Name of bidder or his or her representative: .....
  - 2.2 Identity Number: .....
  - 2.3 Position occupied in the Company (director, trustee, shareholder<sup>2</sup>): .....
  - 2.4 Company Registration Number: .....
  - 2.5 Tax Reference Number: .....
  - 2.6 VAT Registration Number: .....
  - 2.6.1 The names of all directors/trustees/shareholders/members, their individual identity numbers, tax reference numbers, and, if applicable, employee / personal numbers must be indicated in paragraph 3 below.

<sup>1</sup>“State” means –

- (a) any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);
- (b) any municipality or municipal entity;
- (c) provincial legislature;
- (d) National Assembly or the National Council of Provinces; or
- (e) Parliament.

<sup>2</sup>“Shareholder” means a person who owns shares in the company and is actively involved in the management of the enterprise or business and exercises control over the enterprise.

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

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2.7.1 If so, furnish the following particulars:

Name of person / director / trustee / shareholder/member:.....  
Name of state institution at which you or the person connected to the bidder employed:.....  
Position occupied in the state institution>.....,,.....

Any other particulars:

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

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

2.7.2.1 If yes, did you attach proof of such authority to the bid document? **YES / NO**

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

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

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

2.8 Did you or your spouse, or any of the company's directors / trustees / shareholders / members or their spouses conduct business with the state in the previous twelve months? **YES / NO**

2.8.1 If so, furnish particulars:

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

2.9 Do you, or any person connected with the bidder, have any relationship (family, friend, other) with a person employed by the state and who may be involved with the evaluation and or adjudication of this bid? **YES/NO**

2.9.1 If so, furnish particulars.

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

2.10 Are you, or any person connected with the bidder, aware of any relationship (family, friend, other) between any other bidder and any person employed by the state who may be involved with the evaluation and or adjudication of this bid? **YES/NO**

2.10.1 If so, furnish particulars.

.....  
.....

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

2.11.1 If so, furnish particulars:

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

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

Full Name	Identity Number	Personal Reference Number	Tax Number	State Number	Employee Peral

#### 4 DECLARATION

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

CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 2 and 3 ABOVE IS CORRECT.  
I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 23 OF THE GENERAL CONDITIONS OF THE CONTRACT SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....  
Signature Date

.....  
Position Name of bidder

May 2011

**SBD 6.1**

**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) The 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 The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
<b>Total points for Price and SPECIFIC GOALS</b>	<b>100</b>

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- 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).

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## FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

### 3.1. POINTS AWARDED FOR PRICE

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

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

**80/20**

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

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

### 3.2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

#### 3.2.1. POINTS AWARDED FOR PRICE

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

**80/20 or 90/10**

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

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmax = Price of highest acceptable tender

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#### 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: Where 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.)***

**Table 6**

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)
≥ 51% black owned	10	
≥ 31 % black women owned	6	
QSE or EME	4	
<b>Total</b>	20	

**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

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.

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

**SURNAME AND NAME:** .....

**DATE:** .....

**ADDRESS:** .....  
.....  
.....  
.....