



INDEPENDENT DEVELOPMENT TRUST

Invitation to Bid for Pension Fund Administrative Services

IDT/HRM/HO/30/01/2025

**IDT Offices at Glenwood Office Park,
Cnr Oberon and Sprite Street,
Faerie Glen,
Pretoria**

CLOSING DATE: 18 FEBRUARY 2025 AT 12PM

BIDDER INFORMATION

(Must be completed by Bidder)

Company Name	
Contact Person	
CIDB CRS No.	
Cell / Tel Number	
E-mail Address	
CSD Number	
Price (VAT Incl.)	

PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)					
BID NUMBER:	IDT/HRM/HO/30/01/2025	CLOSING DATE:	18 FEBRUARY 2025	CLOSING TIME:	12 PM
DESCRIPTION					
THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).					
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS) The Procurement Officer Independent Development Trust Cnr Oberon & Sprite Streets Faerie Glen Pretoria 0043					
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					
		TCS PIN:		OR	CSD No:
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE [TICK APPLICABLE BOX]		<input type="checkbox"/> Yes		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	<input type="checkbox"/> Yes
		<input type="checkbox"/> No			<input type="checkbox"/> No
IF YES, WHO WAS THE CERTIFICATE ISSUED BY?					
AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA) AND NAME THE APPLICABLE IN THE TICK BOX		<input type="checkbox"/>	AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA)		
		<input type="checkbox"/>	A VERIFICATION AGENCY ACCREDITED BY THE SOUTH AFRICAN ACCREDITATION SYSTEM (SANAS)		
		<input type="checkbox"/>	A REGISTERED AUDITOR		
		NAME:			
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/SWORN AFFIDAVIT (FOR EMEs & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]					
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
	[IF YES ENCLOSE PROOF]			[IF YES ANSWER PART B:3 BELOW]	
SIGNATURE OF BIDDER		DATE		
CAPACITY UNDER WHICH THIS BID IS SIGNED (Attach proof of authority to sign this bid; e.g. resolution of directors, etc.)					
TOTAL NUMBER OF ITEMS OFFERED			TOTAL BID PRICE (ALL INCLUSIVE)		
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO:			TECHNICAL INFORMATION MAY BE DIRECTED TO:		
DEPARTMENT/ PUBLIC ENTITY			CONTACT PERSON		
CONTACT PERSON			TELEPHONE NUMBER		

TELEPHONE NUMBER		FACSIMILE NUMBER	
FACSIMILE NUMBER		E-MAIL ADDRESS	
E-MAIL ADDRESS			

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 ONLINE
1.3.	BIDDERS MUST REGISTER ON THE CENTRAL SUPPLIER DATABASE (CSD) TO UPLOAD MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS; AND BANKING INFORMATION FOR VERIFICATION PURPOSES). B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.
1.4.	WHERE A BIDDER IS NOT REGISTERED ON THE CSD, MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS MAY NOT BE SUBMITTED WITH THE BID DOCUMENTATION. B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.
1.5.	THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER LEGISLATION OR SPECIAL CONDITIONS OF CONTRACT.
2. TAX COMPLIANCE REQUIREMENTS	
2.1	BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
2.2	BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.
2.3	APPLICATION FOR TAX COMPLIANCE STATUS (TCS) OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE WWW.SARS.GOV.ZA.
2.4	BIDDERS MAY ALSO SUBMIT A PRINTED TCS TOGETHER WITH THE BID.
2.5	IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE PROOF OF TCS / PIN / CSD NUMBER.
2.6	WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS	
3.1.	IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? <input type="checkbox"/> YES <input type="checkbox"/> NO
3.2.	DOES THE BIDDER HAVE A BRANCH IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO
3.3.	DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO
3.4.	DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO
<p>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.</p>	

NB: FAILURE TO PROVIDE ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.



INDEPENDENT DEVELOPMENT TRUST

Invitation to Bid for Pension Fund Administrative Services

BID REFERENCE:

TERMS OF REFERENCE

Invitation to Bid for the Provision of Pension Fund Administrative Services for a Period of 5 years.

Assignment Title	:	Provision of Pension Fund Administrative Services to all IDT employees for a period of 5 Years to be provided by Broker and/or Pension Fund Administrators
Bid Reference Number	:	IDT/HRM/HO/30/01/2025
Procurement Type	:	TENDER
Duration of Assignment	:	5 years
Closing Date	:	18 February 2025
Time	:	12pm
Bid Validity Period	:	120 days
Location of Assignment	:	National Office

1. BACKGROUND

The IDT is a Schedule 2 state owned entity that manages the implementation and delivery of critically needed social infrastructure programmes on behalf of government. These programmes include public schools, hospitals, courts, correctional services facilities, clinics, community centres, government offices.

The IDT reports to the Minister of Public Works who is the Shareholder representative and its Executive Authority. The National Office is located in Pretoria with regional offices in all of the country's nine provinces.

2. CONTEXT

IDT is currently in the process of capacitating its structures to be able to fulfil its mandate. In this process IDT recognizes the need to provide its employees and potential employees with comprehensive the Pension Fund benefits.

Pension Fund services are a critical component of the Employee Health and Wellness (EHW) service offerings. The primary goal of the EHW is to empower employees to take ownership of their overall financial wellbeing and provide them with the necessary support as well as appropriate interventions towards their optimal functioning and productivity in both their work, personal lives and post work lives. This initiative is essential for attracting and retaining talent and is also key for the employer to provide employee job satisfaction, attraction and retention of best talent required for the implementation and operation of IDT. The IDT is implementing this critical element to achieve the following:

- Improved and immediate visible Employee Wellness
- Ability by IDT to attract Talent from Employers who already have these benefits.
- Improved Performance by happy and healthy Employees.
- Reduced Labour Turnover.
- Building the IDT Brand.
- Attraction and Retention of Talent.
-

To align with modern pension fund management practices, this initiative seeks to achieve the following:-

- Integration of ESG (Environmental, Social, and Governance) factors in investment strategies.
- Enhanced digital pension fund administration with user-friendly self-service portals.
- Flexible and customized retirement planning solutions for employees.
- Robust cybersecurity and compliance measures to protect employees' financial data.
- Transparent cost structures and performance-based incentives for fund administrators.
- Diversity, Equity, and Inclusion (DEI) considerations in pension fund policies.

3. SCOPE OF WORK

Bidders to provide proposals for the **Provision of Pension Fund Administrative Services to all IDT employees for a period of 5 years with an option to renew.** The following will be required from the Bidders:

- 3.1 Design and implementation of the best Pension Fund Packages suitable for the IDT employees.
 - 3.1.1. Group Life Assurance of up to R7 500 000.00, without underwriting
 - 3.1.2 Disability Cover of 75% of monthly CTC (up to the age of 65 years)
 - 3.1.3 Dread Disease Cover (Cancer, Diabetes, HIV/AIDS, etc.)
 - 3.1.4 Group Income Protection R2 500 000.00 (for Temporary Illness or Disabled Members)
 - 3.1.5 Spouse cover up to 1 times annual pensionable salary (up to a maximum of R2 000 000.00)
 - 3.1.6 Must have Investment Performance of inflation and return
 - 3.1.7 Funeral Cover for employee R60 000, spouse and children
 - 3.1.8 Extended family funeral cover for employees extended family
 - 3.1.9 Education cover
 - Must have Capital Guarantee of 80% Diversity, Equity, and Inclusion (DEI) considerations in pension fund policies.
 - 3.1.10 ESG-compliant investment portfolios ensuring sustainable and responsible investing.
 - 3.1.11 Digital pension fund management tools, including mobile and AI-driven support.
 - 3.1.12 Comprehensive employee financial wellness programs, including retirement planning and debt management workshops.
 - 3.1.13 Full compliance with regulatory requirements, including FAIS, FSCA, and other applicable laws.
 - 3.1.14 Transparent fee structures with clear disclosure of all associated costs.
 - 3.1.15 Robust cybersecurity measures to protect employee data and financial information.
 - 3.1.16 Flexible contribution and withdrawal options to cater to diverse employee financial needs.
 - 3.1.17 Risk and fraud management strategies to prevent pension fund abuse and mismanagement.

The services should be effective with immediate effect for the employees, no waiting periods will be allowed.

4. EXPECTED RESULTS

IDT hereby invites bids from suitably qualified Bidders. for the **Provision of Pension Fund Administrative Services to all IDT employees for a period of 5 Years.**

The selected bidder must:

- Implement a **financially sustainable pension fund** that ensures capital growth and security.
- Provide **seamless and efficient pension fund administration** with real-time reporting.
- Enhance **employee financial literacy** through targeted educational programs.
- Ensure **high standards of ethical governance and compliance** with relevant pension laws.
- Deliver **cost-effective solutions** that maximize employee benefits while minimizing administrative costs.

5. PROCUREMENT APPROACH

5.1 Price Declaration Form

Please indicate your total tender price here:
R_____ (compulsory)

Important:

It is mandatory to indicate the total tender price as requested above. This price must be the same as the total tender price in the pricing schedule. Should the total tender prices differ, the one indicated above shall be considered the correct price.

The following must be noted:

- 5.1.1 All prices must be VAT inclusive and must be quoted in South African Rand (ZAR).
- 5.1.2 All prices must be firm and fixed from the tender closing date and for the duration of the contract.

5.1.3 All bidders must cost according to the costing template provided or this will lead to disqualification.

5.1.4 The cost of delivery, labour etc. must be included in the proposal.

5.2. Tender Returnable Requirements

Bidders shall submit all mandatory documents as indicated in the Table 1 below for evaluation purposes. Failure to submit these documents by the Bidder shall be regarded as non-responsive / mandatory non-performance / non-compliance and the Bidder's submission shall be disqualified.

Table 1: Tender Returnable Requirements to be submitted for Evaluation.

Document that must be Submitted	Mandatory for the TENDER	Non-Submission will Result in Disqualification
SBD 1	Yes	Invitation to Bid - Complete and sign the supplied document
CIPC Documents	Yes	CIPC Registration Documents
Certified copies of the Directors IDs	Yes	
Tax Pin	Yes	Bidders must ensure compliance with their tax obligations, by providing one of these listed below: <ul style="list-style-type: none"> • Unique personal identification number (PIN) issued by SARS. • Application for tax compliance status (TCS) pin may be made via e-filing through the SARS website www.sars.gov.za. • In quotes where consortia / joint ventures / sub-contractors are involved; each party must submit a separate Tax Pin and CSD Summary Report
SBD 4	Yes	Declaration of Interest – Complete & sign the supplied document
Registration on Central	Yes	The Bidders must be registered on the Central Supplier Database (CSD). If you are not registered proceed to complete the registration of your

Document that must be Submitted	Mandatory for the TENDER	Non-Submission will Result in Disqualification
Supplier Database (CSD)		company prior to submitting your proposal. Visit https://secure.csd.gov.za/ to obtain your vendor number. Bidders must provide proof of registration.
Letter of Good Standing	Yes	Bidders to submit a valid Letter of Good Standing issued by the Department of Labour or RMA.
Registration with the National Credit Regulator (NCR)	Yes – Pension Fund	Bidders to submit proof of registration with the NCR as required by the Law
Group Life ACT	Yes	Bidders to submit proof of accreditation to the life group association.
Registration with the Financial Sector Conduct Authority (FSCA)	Yes – Pension Fund	Bidders to submit proof of registration with the FSCA as required by the Law
Confirmation of Liquidity	Yes	Bidders to submit a letter from the bank / auditor confirming the liquidity of the company.
Project Implementation Methodology	Yes	Bidders must submit a draft Project Plan specific to this scope of work
Compliance with ESG investment principles and responsible financial management.	Yes	Bidders must submit ESG-compliant investment portfolios ensuring sustainable and responsible investing.

Document that must be Submitted	Mandatory for the TENDER	Non-Submission will Result in Disqualification
Evidence of digital capability for pension fund administration.	Yes	Bidders must submit digital pension fund management tools, including mobile and AI-driven support.

We undertake to hold this offer open for acceptance for a period of **120 days** from the date of submission of offers. We further undertake that upon final acceptance of the offer, we will commence with delivery when required to do so by the Client.

Name _____ of _____ Bidder: _____

Signature of Bidder: _____ Date: _____

8. EVALUATION CRITERIA FOR FUNCTIONALITY

8.1 All submissions must be clearly marked: “**For attention: Supply Chain Management**” with the **tender Number** included and **hand delivered**. The Tender Box is situated inside the IDT office.

The address is: -

**The Procurement Officer
Independent Development Trust
Cnr Oberon & Sprite Streets
Faerie Glen
Pretoria
0043**

8.2 Bid documents shall only be considered when received by or before the closing date and time which is **18 FEBRUARY 2025**. Time : 12pm

8.3 The bidder(s) are required to submit **Five (5)** Copies as follows: -

8.3.1 One (1) original

8.3.2 Four (4) duplicates

8.4 Each submission must be marked correctly and sealed separately for ease of reference during the evaluation process.

8.5 Bidders are requested to **initial each page** of the tender document on the **right-hand** side at the bottom of each page.

8.6 This tender is subject to the Preferential Procurement Policy Framework Act, 2000 and the Preferential Procurement Regulations, 2017, the General Conditions of Contract (GCC) and, if applicable, any other Special Conditions of Contract.

8.7 No responses 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.

9 CONTACT AND COMMUNICATION

9.1 All communication and enquiries shall be **in writing** (via email), to the following email address, _____. IDT will communicate with all Bidders where clarity regarding this tender is sought.

9.2 **Clarification questions from bidders will be closed ONE (1) before date of closure on the tender.**

9.3 Any communication to an official in respect of the tender between the closing date and the award of the contract by the Bidders is prohibited.

9.4 If a Bidder finds or reasonably believes it has found any discrepancy, ambiguity, error or inconsistency in this tender or any other information provided by IDT (other than minor clerical matters), the Bidders must promptly notify IDT in writing of such discrepancy, ambiguity, error or inconsistency in order to afford IDT an opportunity to consider what corrective action is necessary (if any).

9.5 Any actual discrepancy, ambiguity, error, or inconsistency in the tender or any other information provided by IDT will, if possible, be corrected and provided to all Bidders without attribution to the Bidders who provided the written notice.

9.6 All persons (including Bidders) obtaining or receiving the tender and any other information in connection with the tender must keep the contents of the tender and other such information confidential, and not disclose or use the information except as required for the purpose of developing a response to the tender.

10 LATE SUBMISSION

10.1 Late responses to the tender will not be accepted.

10.2 All dates and times in this tender are in accordance to the South African standard calendar and time.

10.3 Any time or date in this tender is subject to change at IDT discretion. The establishment of a time or date in this tender does not create an obligation on the part of IDT to take any action or create any right in any way for any Bidders to demand that any action be taken on the date established.

10.4 The Bidders accepts that, if IDT extends the deadline for the tender submission (the closing date) for any reason, the requirements of this tender otherwise apply equally to the extended deadline.

11 EVALUATION OF BIDS

11.1 Bids will be evaluated there will be **Three (3) stages** in the evaluation of the bids: -

11.1.1 **Stage 1 – Administrative Requirements Criteria**

This is the assessment of compliance with the minimum Administrative Requirements as detailed in **Table 1**. No points or score will be allocated in criteria, either Bidders comply or do not comply. Noncompliance will result in disqualification.

Table 2: Administrative Requirements

Description	Compliant	Non-Compliant
CIPC Registration Documents		
Copies of the Directors IDs		
Tax Pin		
Valid CSD Report		
Letter of Good Standing		

Completed and signed Bid Document including SBD Documents		
Proof of Liquidity		
Proof of registration with the NCR as required by the Law		
Proof of registration with the FSCA as required by the Law		

11.1.2 **Stage 2 - Technical / Functionality Evaluation**

11.1.2.1 **Only** bids that comply with the indicated **Administrative Requirements** will be considered for the Technical / Functional Evaluation Stage.

11.1.2.2 The Technical / Functional Evaluation criteria for this bid is indicated in **Table 3** including the scoring system and weight allocation that will be used for the evaluation of the bids. Bidders are required to achieve a minimum of **70 points** out of **100 points** to proceed to Stage 3 (Price and specific goals)

11.1.2.3 Bidders must ensure that their proposals contain all information required in **Table 1** to assess the highlighted criteria.

Table 3: Service Providers Experience Evaluation Criteria

References	No. of Letters	Points Claimed
Proof of experience of a Service Provider must be submitted in the form of reference letters from the previous clients that the company provided similar service to. The letters should be in those companies' letterheads and must be signed.	11 and more	25
	7 – 10	14
	4 - 6	7
	Less than 3	0
Total Points Claimed		25

Table 4: Qualifications and CVs of a Fund Administrators and/or Brokers Experience

Resources	Qualifications	Points Claimed
Submit CVs and certified copies of qualifications of the key personnel involved in the day to day management of the fund. <ul style="list-style-type: none"> • Wealth management NQF 5 • FSCA and FSP accredited category 1.7 • RE 5 and RE 1 regulatory exam • CPD points as per the FAIS Act Note: Certify copies must not be older than 6 months if not certified you lose points.	All qualifications	25
	Less1 Qual	20
	less 2 Qual	15
	Less 3 Qual	10
	No qualification	0
Total Points Claimed		25

Table 5: Experience of a Fund Administrators and/or Brokers

Resources	Years of Experience	Points Claimed
The Fund Administrators proof of experience must be submitted in the form of reference letters from the previous clients that the company provided similar service to. The letters should be in those companies' letterheads and must be signed.	11 and more	25
	7-10	14
	4-6	7
	Less than 3	0
Total Points Claimed		25

Table 6: Implementation Methodology/Plan

Resources	Methodology/Plan	Points Claimed
Detailed plan on how the project will be rolled out. <ul style="list-style-type: none"> • Must have legal & regulatory 	6	25
	5-4	20
	3-2	10

compliance	1	0
<ul style="list-style-type: none"> • Contribution management • Benefits Administration • Operational efficiency • Financial sustainability • Risk management • Performance monitoring & reporting 		
Total Points Claimed		25
Total		100
Minimum point		70

11.1.3 Stage 3 – Price and Specific goals.

1.1 Bidders must fully complete the Pricing Schedule in Table 5 below. The bid will be evaluated on the 80/20 principle. To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS	
PRICE	90	80
SPECIFIC GOALS	10	20
TARGETED GROUP		
Women 100%	3	6
Youth 100%	3	6
People with Disabilities 100%	2	4
Black Mail 100%	2	4
Total points for Price and SPECIFIC GOALS	100	100

11.1.4 Oral presentations and Briefing Sessions

11.1.4.1 Bidders with qualifying bids may be required to give an oral presentation, which may include, but is not limited to, an equipment/service demonstration of their proposal to IDT. This provides an opportunity for the Bidders to clarify or elaborate on the proposal. This is a fact finding and explanation session only and does not include negotiation. IDT shall schedule the time and location of these presentations. Oral presentations are an option of IDT and may or may not be conducted.

12 VALIDITY PERIOD OF THE TENDER

12.1 The validity period of this TENDER shall be **120 days** from the closing date.

13 DURATION OF THE CONTRACT

13.1 The delivery period or implementation time of the contract shall be **5 years** with an option to renew. Bidders to indicate their duration in the proposal.

14. PRICING SCHEDULE

Bidders to submit a price proposal based on admin fees.

Item	score
Functionality	100
1.1. Service Providers Experience Evaluation Criteria	30
1.2. Qualifications and CVs of a Fund Administrators and/or Brokers Experience	30
1.4 . Implementation Programme/Methodology	40

15. ENQUIRIES

15.1 Should it be necessary for a bidder to obtain clarity on any matter arising from or referred to in this bid document, please refer your enquiries, in writing, to the contact person(s) listed below.

15.2 Enquiries regarding this bid must be addressed to pensionfund@idt.org.za office no. 012 845 2098.

16. BRIEFING SESSION

A briefing session shall be conducted at the **IDT Offices at Glenwood Office Park, Cnr Oberon and Sprite Street, Faerie Glen, Pretoria. On the 04 February 2025 at 10am.**

Detailed Terms of Reference (ToR) for the assignment shall be available from the date of the advert.

17. CLOSURE AND SUBMISSION OF BID

The bid closes on **18 FEBRUARY 2025: TIME 12PM**. Bids must be submitted in a sealed envelope, and deposited in tender boxes at the IDT head office, Glenwood Office Park, Cnr. Sprite & Oberon Streets, Faerie Glen, Pretoria.

It is the responsibility of the Bidder to ensure that all documents supporting his/her bid are submitted on time and as required.

18 VALIDITY PERIOD OF THE TENDER

- a. The validity period of this TENDER shall be **120 days** from the closing date.

19 DURATION OF THE CONTRACT

- a. The delivery period or implementation time of the contract shall be **5 years** with an option to renew. Bidders to indicate their duration in the proposal.

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 interest 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 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 consortium will not be construed as collusive bidding.

3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.

3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during

the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....

Signature

Date

.....

Position

Name of bidder

CONFIDENTIAL

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**

(delete whichever is not applicable for this tender).

- a) The applicable preference point system for this tender is the **90/10** preference point system.
- b) The applicable preference point system for this tender is the **80/20** preference point system.
- c) Either the **90/10 or 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	90	80
SPECIFIC GOALS	10	20
TARGETED GROUP		
Women 100%	3	6
Youth 100%	3	6
People with Disabilities 100%	2	4
Black Mail 100%	2	4
Total points for Price and SPECIFIC GOALS	100	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 or 90 points is allocated for price on the following basis:

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

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:

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

Where

- Ps = Points scored for price of tender under consideration
 Pt = Price of tender under consideration
 Pmax = Price of highest acceptable tender

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 either the 90/10 or 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.)

The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Women 100% Ownership	3	6		
Youth 100% Ownership	3	6		
People with Disabilities 100% Ownership	2	4		
Black Male 100% Ownership	2	4		

Source Documents to be submitted with the Bid or RFQ

- *CIPC Document (Company Registration Document will be required for verification (CIPC DOC))
- *Woman (Originally Certified ID Document)
- *Youth (Originally Certified ID Document)
- *People with Disability (Letter from the Dr. Confirming the Disability)
- *Black Ownership (Originally Certified ID Document)

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:

