



**INDEPENDENT DEVELOPMENT TRUST**

**IDTECRFP/71/DOE/CTM/2025/26**

**QUOTATION TITLE:**

**REQUEST FOR PROPOSALS FOR A CONSORTIUM OR MULTI-DISCIPLINARY PROFESSIONAL SERVICES CONSISTING OF ARCHITECTS AND PRINCIPAL AGENT, QUANTITY SURVEYOR, CIVIL & STRUCTURAL ENGINEERS, ELECTRICAL & MECHANICAL ENGINEERS, OCCUPATIONAL HEALTH AND SAFETY AGENT AND SOCIAL FACILITATOR FROM STAGE 1 TO STAGE 6 FOR THE CONSTRUCTION OF THE NEW O.R. TAMBO COASTAL DISTRICT OFFICES SITUATED IN PORT ST JOHNS IN THE EASTERN CAPE PROVINCE**

**CLOSING DATE**

The completed Bid Document sealed in an envelope and clearly endorsed must be placed in the Tender Box situated at the entrance to the Offices of the Independent Development Trust (IDT)

**By no Later than 12h00 on Monday 23 February 2026**

**BIDDER'S INFORMATION**

*(Must be completed by Bidder)*

Company Name	
Contact Person	
Pr Reg Number	
Cell / Tel Number	
E-mail Address	
CSD Number	

**Prepared By:**

The Independent Development Trust (IDT)  
EC Regional Office  
Palm Square Business Park  
Silverwood House, Bonza Bay  
Road, Beacon Bay  
EAST LONDON

## 1. TERMS OF REFERENCE

ITEM	DESCRIPTION
1.1 Tender Issue Date	Friday, 23 January 2026
1.1.1 Compulsory Briefing	Thursday, 05 February 2026 at 11h00 OR Tambo Coastal District Offices Port St Johns.
1.2 Tender Closing Date	Monday, 23 February 2026, 12:00 – No late submissions will be received and/or considered.
1.3 Quote Reference No.	<b>IDTECRFP/71/DOE/CTM/2025/26</b>
1.4 Enquiries	<p>Any queries shall be directed in writing to the IDT and shall be addressed to the contact person/s in the addresses indicated below;</p> <p><b><u>SCM enquiries</u></b></p> <p><b>Name:</b> Zanele Madzidzela  <b>Email:</b> <a href="mailto:zanelem@idt.org.za">zanelem@idt.org.za</a>  <b>Tel:</b> (047) 711 6000 (08h30 – 17h00 weekdays only)</p> <p><b><u>Technical enquiries</u></b></p> <p><b>Name:</b> Bonga Boo  <b>Email:</b> <a href="mailto:bongab@idt.org.za">bongab@idt.org.za</a>  <b>Tel:</b> (047) 711 6000 (08h30 – 17h00 weekdays only)</p>
1.5 Evaluation Criteria	<p><b>1.5.1 The Bid will be evaluated in Three Stages</b></p> <ul style="list-style-type: none"> <li>(a) Stage 1: Mandatory Requirements,</li> <li>(b) Stage 2: Functionality,</li> <li>(c) Stage 3: The 80/20 Evaluation System will be used for procuring items with values of R30 000 and above but not exceeding R50 000 000 inclusive of Vat (PPPFA and IDT SCM Policy) Price; and</li> </ul> <p>Preference points claim form in terms of the preferential procurement regulations 2022.</p>

<p><b>STAGE 1 OF EVALUATION</b></p> <p><b>1.6 Compulsory Requirements</b></p>	<p>1.6.1 Bidder must be registered on CSD if JV/Consortium all JV/Consortium members must be registered.</p> <p>1.6.2 Invitation to Bid (SBD 1) Fully Completed and signed</p> <p>1.6.3 Declaration of Interest (SBD 4) Fully Completed and signed</p> <p>1.6.4 Preference Points Claim Form in terms of the Preferential Procurement (SBD 6.1) Fully completed and signed</p> <p>1.6.5 Fully Completed Fee Proposal in line with the Pricing Instruction as indicated in the bid document</p> <p>1.6.6 Consortium agreement for a consortium or Sub-Consultant agreement for sub-consultancy from each discipline or JV Agreement if it's a JV.</p> <p>1.6.7 Completed Form of Offer which is fully signed and witnessed</p> <p>1.6.8 Proof of Professional Indemnity of at least R 6 million, which will be adjusted to be aligned to be twice the value of the Professional fees on appointment. The PI should be from a licensed Financial Service Providers (FSP)". If the bidder is in a consortium, the Proof of professional indemnity of at least 2 million for each discipline excluding social facilitator.</p> <p>1.6.9 Provide Proof of Professional Registration with the South African Council for Architectural Profession (SACAP) and CV (with copy of Qualifications) of person to be dedicated / designated to the project. The Architect will be the lead consultant and Principal Agent on the project.</p> <p>1.6.10 Acknowledgement of Record of Addenda to bid document if applicable</p> <p><b>The Professional team shall comprise of the following disciplines who must provide their qualifications and valid proof of registration with the relevant council as per the Council for Built Environment Act of 2000.</b></p> <ul style="list-style-type: none"> <li>• Prof. Civil &amp; Structural Engineer (ECSA)</li> <li>• Prof. Quantity Surveyor (SACQSP)</li> <li>• Prof. Architect (SACAP)</li> <li>• Prof. Electrical &amp; Mechanical Engineers (ECSA)</li> <li>• Prof. Occupational Health &amp; Safety Agent (SACPCMP)</li> <li>• Social Facilitator (Min Diploma or Degree in Social Sciences, Community Development, Development Studies, Public Administration, Social Work, or related field, proof of professional registration not applicable)</li> </ul> <p>1.6.11 Duly signed Letter of Authority MUST be submitted authorising the individual to sign on behalf of the bidder if:</p> <p>a) If there are more than one Owner/ Director / Shareholder / Member / Trustee etc. OR</p> <p>b) If there is only one Director / Shareholder / Member / Trustee / Owner etc. and they are not the one completing the bid document.</p> <p>c) If it is consortium or joint venture, each party or company must submit letter of authority or letter of intent signed by all directors.</p> <p>The Letter of Authority MUST be signed by all directors of the Bidder (or a signed Board Resolution authorising the signatory will be accepted).</p> <p><b>The Bid Document must be completed / fill in using permanent black ink pen. Failure to comply will lead to disqualification.</b></p> <p><b><u>FAILURE TO SUBMIT ANY OF THE ABOVE WILL LEAD TO DISQUALIFICATION</u></b></p>

STAGE 2- CRITERIA FOR FUNCTIONALITY (BIDDER TO OBTAIN MINIMUM TRHESHOLD OF 49 POINTS TO BE FURTHER EVALUATED FOR PRICE AND SPECIFIC GOALS)			
CAPACITY			
HUMAN RESOURCES			
EXPERIENCE AND TRACK RECORD OF KEY PERSONS TO BE ENGAGED ON THE PROJECT			
Documents to be Submitted			
<ul style="list-style-type: none"><li>Detailed break-down of the team or Completion of Annexure C and</li><li>CV's of the individual team members of the Key resource listed below with detailed reference names and contact numbers and the number of years' of experience required.</li><li>Copies of qualification that is relevant to the field.</li><li>Copies of the Professional Registration to the relevant professional council/body with registration numbers. Expired registration will lead to non-allocation of points.</li><li>If bidder is using a resource that is not currently working for the company, the bidder should submit Letter of Intent with CV to work for company.</li></ul>			
	Experience will be counted post professional registration.		
i)	Professionally registered Architect (Pr. Arch) will score points as follows: <ul style="list-style-type: none"><li>10 and more years of post-registration experience = 7 Points</li><li>5 to 9 years of post-registration experience = 4 Points</li><li>3 to 4 Years post registration = 2 Points</li><li>Less than three years of post-registration experience in architectural services = 0 points</li></ul>	30	
ii)	Professionally registered Quantity Surveyor (Pr. QS) will score points as follows: <ul style="list-style-type: none"><li>10 and more years of post-registration experience = 7 Points</li><li>5 to 9 years of post-registration experience = 4 Points</li><li>3 to 4 Years post registration = 2 Points</li><li>Less than three years of post-registration experience in architectural services = 0 points</li></ul>		
iii)	Professionally registered Civil & Structural Engineer (Pr. Tech/ Pr. Eng): <ul style="list-style-type: none"><li>10 and more years of post-registration experience in the field =7 Points,</li><li>5 to 9 years of experience in the field = 4 Points,</li><li>3 to 4 Years post registration experience = 2 Points</li><li>Less than three years post-registration experience in structural engineering and the field = 0 points</li></ul>		
iv)	Professionally registered Electrical & Mechanical Engineer (Pr. Tech/ Pr.Eng): <ul style="list-style-type: none"><li>10 and more years of post-registration experience in the field = 3 Points,</li><li>5 to 9 years of experience in the field = 2 Points,</li><li>3 to 4 years of experience in the field = 1 point</li><li>Less than three (3) years post of experience in the field = 0 points</li></ul>		
v)	Professionally registered Occupational Health and Safety Agent with SACPCMP: <ul style="list-style-type: none"><li>10 and more years of post-registration experience in the field = 3 Points,</li><li>5 to 9 years of experience in the field = 2 Points,</li><li>3 to 4 years of experience in the field = 1 point</li><li>Less than three (3) years post of experience in the field = 0 points</li></ul>		

vi)	<b>Social Facilitator:</b> <b>(Min requirement is a Diploma or Degree in Development Studies, Social Sciences, Community Development, Public Administration, Social Work or related field)</b> <ul style="list-style-type: none"> <li>10 and more years of experience in the field = 3 Points,</li> <li>5 to 9 years of experience in the field = 2 Points,</li> <li>3 to 4 years of experience in the field = 1 point</li> <li>Less than three (3) years post of experience in the field = 0 points</li> </ul>		
<b>COMPANY LOCATION AND EXPERIENCE</b>			
a	<b>Locality</b> of the bidder's main office/branch to the project location. The physical address of the office /office branch of the Bidder or one of the Consortium Members: In O.R. Tambo Coastal District Municipality = 5 points within Eastern Cape not in O.R. Tambo Coastal = 3 points If all the Consortium Members are Outside Eastern Cape = 0 Point  <b>Proof of Physical Address which is FICA verified such as Copy of Utility Bill or Copy of Telephone Bill, or Tax Clearance Certificate, or Bank Statement, submitted by the bidder.</b>	<b>5</b>	
b	<b>Company Experience of the Lead Consultant:</b> <ul style="list-style-type: none"> <li>List of completed similar projects undertaken with reference to type of project (submit reference letter for each similar project completed up to a maximum of 5 reference letters).</li> <li>Failure to submit the list of projects with reference letters will result in non-allocation of points.</li> </ul> Reference letter should indicate the following <ul style="list-style-type: none"> <li>Signature of the client</li> <li>Client's Letter head or Client Stamp</li> <li>Company name, contact person, contact details (telephone number and email address)</li> <li>Works carried out</li> <li>Works have been completed satisfactorily</li> </ul>	<b>35</b>	
i	More than 5 (five) similar projects with respective reference letters	<b>35</b>	
ii	5 (five) similar projects with respective reference letters	<b>20</b>	
iii	4 (four) similar projects with respective reference letters	<b>15</b>	
iv	3 (three) similar projects with respective reference	<b>10</b>	
v	Less than three (3) similar projects with respective reference letters	<b>0</b>	
<b>Total Points</b>			<b>70</b>

ITEM	DESCRIPTION
1.7 Returnable Documents	1.7.1 In line with the Submission checklist
1.8 Eligibility To Bid	<p>The Professional Service Provider are expected to consist of a team of professionals who are professionally registered with the following councils</p> <ul style="list-style-type: none"> <li>• Prof. Quantity Surveyor (SACQSP)</li> <li>• Prof. Civil &amp; Structural Engineer (ECSA)</li> <li>• Prof Architects (SACAP)</li> <li>• Prof. Electrical &amp; Mechanical Engineer (ECSA)</li> <li>• Prof. Occupational Health &amp; Safety Agent (SACPCMP)</li> <li>• Social Facilitator (Proof of professional registration not required)</li> </ul> <p><b>Failure to meet the above requirements, will result in disqualification without further consideration.</b></p>
1.9 Bid Award Criteria	<p>1.9.1 The bid will be awarded to the highest points scorer provided that;</p> <p>1.9.2 The bidder must be registered and active on CSD</p> <p>1.9.3 Provision of original or Certified copy of Active (non- expired) proof of registration for all disciplines listed <b>under 1.8</b> professional registration and/or letter of good standing</p> <p>1.9.4 CIPC Document and certified ID documents of directors not older than six months from closing date</p> <p>1.9.5 Bidders must ensure compliance with their tax obligations.</p> <p>1.9.6 The bidders' Tax status will be verified on the CSD prior to the bid award and where the preferred bidders is not compliant, 7 working days will be granted for remedy, failing which the bidder will be disqualified.</p> <p>1.9.7 The IDT reserves the right not to award the bid to the highest points scorer, after performing risk assessment and deemed to be risky to proceed with the appointment.</p> <p>1.9.8 Restricted bidders by Treasury will be disqualified.</p>
1.9 Submission of Quotation documents	<p>Bid documents shall be <b>hand delivered</b> in 1 combined pack (<i>i.e Bid document and its accompanying Annexures</i>) to the Implementing Agent (<i>IDT</i>), and shall be marked as follows:</p> <p><b>The Independent Development Trust (IDT)</b>  EC Regional Office  Palm Square Business Park  Silverwood House, Bonza Bay Road,  Beacon Bay  EAST LONDON</p> <p><b>Marked confidential Quotation and Indicate the Following:</b></p> <p><b>IDTECRFP/71/DOE/CTM/2025/26</b></p> <p><b>REQUEST FOR PROPOSALS FOR A CONSORTIUM OR MULTI-DISCIPLINARY PROFESSIONAL SERVICES CONSISTING OF ARCHITECTS AND PRINCIPAL AGENT, QUANTITY SURVEYOR, CIVIL &amp; STRUCTURAL ENGINEERS, ELECTRICAL &amp; MECHANICAL ENGINEERS, OCCUPATIONAL HEALTH AND SAFETY AGENT AND SOCIAL FACILITATOR FROM STAGE 1 TO STAGE 6 FOR THE CONSTRUCTION OF THE NEW O.R. TAMBO COASTAL DISTRICT OFFICES SITUATED IN PORT ST JOHNS IN THE EASTERN CAPE PROVINCE</b></p>
1.10 Pricing / Fee Proposal / Quotation	1.10.1 Quotations shall be percentage based and apportioned per stage, then carried out in line with the pricing schedule attached in this document.

ITEM	DESCRIPTION
	<p><b>1.10.2</b> <u>Construction budget shall be the basis of calculating the fees, Professional fees for the Professional Services Team will be paid on a fixed percentage basis which are to be adjusted in line with the quotation received, once the awarded construction cost is known. Fees are to be adjusted inline with the quotation received, once the final account amount is known.</u></p> <p><b>1.10.3</b> <b>No delegation of duties to Candidate Professionals will be accepted during the implementation of the project except for specific duties and these are to be communicated and approved by the IDT if this does not pose a risk to the project.</b></p> <p><b>1.10.4</b> The Employer reserves the right to reduce or increase the scope of works according to the budget or verification of actual work on site after assessments, or to terminate this contract, without payment of any penalty in this regard</p> <p><b>1.10.5</b> Quotations shall be inclusive of VAT (Where Applicable - VAT Vendors)</p> <p><b>1.10.6</b> <b>Quotations shall be valid for 90 calendar days.</b></p> <p><b>1.10.7</b> All costs related to the service to be provided shall be included in the quotation.</p> <p><b>1.10.8</b> All work stages for the project shall be quoted for. As indicated in item 1.10.2 above, all costs related to the service to be provided shall be included in the quotation.</p> <p><b>1.10.9</b> The quotation shall be inclusive of all work expenses as there shall be no additional monies that will be paid by the Employer for this project. As such all work-related risks shall be factored in the bidder's quotation. Price / Fee adjustments shall only be carried out if and when the construction price changes, as is the norm, and in line with the applicable tariff of applicable professional fees.</p>
<b>1.11 Disbursements</b>	<p><b>1.11.1</b> <u>Disbursement costs, if any, shall be paid on a proven incurred cost basis in line with applicable guidelines as per the National Department of Public Works (NDPW) "Rates for Reimbursable Expenses".</u></p> <p><b>1.11.2</b> <u>The maximum rate applicable shall be for vehicles up to and not greater than 2 500cc.</u></p> <p><b>1.11.3</b> <b>The base towns (Focal point) for traveling to project shall be East London, Kokstad and Mthatha. Should the office be in a distance which is lessor than the base towns, travelling will be remunerated on actual distance.</b></p> <p><b>1.11.4</b> Consultants based on same geographic location are required to coordinate and share transport to reduce costs up to a maximum number of 4 persons in a vehicle in alignment with the relevant traffic laws.</p> <p><b>1.11.5</b> Claims to be accompanied by trip logs indicating origin, destination, distance, and purpose. Attendance registers or proof of site presence and receipt or invoices for other disbursement items.</p> <p><b>1.11.6</b> On appointment a schedule of meetings to developed from Planning to Close-out of the project. Any additional travel beyond the scope must be pre-approved by the IDT.</p> <p><b>1.11.7</b> Printing of documentation shall be kept to a minimum by introducing and utilization of digital platforms for communication such as shared drive, BIM, etc.</p>
<b>1.12 Amendments</b>	<p><b>1.12.1</b> Any amendments to the rates offered or description given must be signed by an authorized person (i.e. who signed the original quotation)</p>
<b>1.13 Scope of Works</b>	<p><b>1.13.1</b> The proposed scope is:  The IDT seeks a Consortium or Multidisciplinary professional service providers which will be led by the Architect (PA) from Stage 1 (initiation phase) to Stage 6 (closeout phase) for the construction</p>

	<p>of new O.R. Tambo Coastal District Offices situated in Port St Johns in the Eastern Cape Province. The <b>Architect &amp; Principal Agent</b> to provide the following professional services:</p> <ul style="list-style-type: none"> <li>• Quantity Surveying</li> <li>• Architectural</li> <li>• Electrical &amp; Mechanical Engineering</li> <li>• Civil and Structural Engineering</li> <li>• Occupational Health &amp; Safety</li> <li>• Social Facilitator with relevant experience and qualifications (No proof of professional registration needed)</li> </ul> <p>The contractor shall achieve in the performance of the contract the Contract Skills Development Goal (CSDG) established in the cidb Standard for Developing Skills through Infrastructure Contracts, published in Gazette Notice No.48491 of 28 April 2023</p>
<b>1.13.1 Project Background</b>	<p>The Independent Development Trust (IDT) is implementing new infrastructure construction of new O.R. Tambo Coastal District Offices situated in Port St Johns in the Eastern Cape Province. In order to support the implementation of this project, the IDT requires the services of a <b>consortium / multidisciplinary professional team</b> with relevant built environment expertise to execute the project from <b>Stage 1 (Initiation)</b> through to <b>Stage 6 (Close-Out)</b> in accordance with the Infrastructure Delivery Management System (IDMS) and Framework for Infrastructure Delivery and Procurement Management (FIDPM)</p>
<b>1.13.2 Scope of Work</b>	<p>The appointed consortium or multidisciplinary professional service provider (PSP) will be responsible for <b>the planning, design, documentation, procurement support, contract administration, project monitoring, and close-out</b> of the project in line with applicable regulations and professional guidelines.</p> <p>The PSP shall:</p> <ul style="list-style-type: none"> <li>• Deliver services for the full project life cycle — Stages 1 to 6;</li> <li>• Coordinate and integrate all professional disciplines to ensure time, cost, scope, and quality objectives are met;</li> <li>• Comply with National Treasury frameworks and other statutory requirements,</li> <li>• Compliance with Education Facilities Management System (EFMS) Stages 1 to 6,</li> <li>• Compliance with submission and approval of designs through the Client PAC Stages 1 to 4.</li> </ul>
<b>1.13.3 Required Professional Discipline</b>	<p>The consortium must include (but is not limited to) the following professional disciplines, each led by appropriately registered professionals with the relevant statutory councils (SACAP, SACQSP, ECSA, SACPCMP, etc.):</p> <ul style="list-style-type: none"> <li>• Architectural Services &amp; Principal Agency Function <ul style="list-style-type: none"> <li>– Lead and coordinate the design team,</li> <li>– Principal Agent under JBCC PBA Contract</li> </ul> </li> <li>• Quantity Surveying Services <ul style="list-style-type: none"> <li>– Cost planning, BoQ preparation, procurement documentation, valuations, final accounts.</li> </ul> </li> <li>• Electrical &amp; Mechanical Engineering Services <ul style="list-style-type: none"> <li>– Building services design, specifications, and coordination.</li> </ul> </li> <li>• Civil &amp; Structural Engineering Services <ul style="list-style-type: none"> <li>– Civil works, site infrastructure, structural design, and coordination with other trades.</li> </ul> </li> <li>• Occupational Health &amp; Safety Services <ul style="list-style-type: none"> <li>– Compliance with Construction Regulations, safety files, site monitoring and auditing.</li> </ul> </li> <li>• Social Facilitation Services <ul style="list-style-type: none"> <li>– Community engagement, stakeholder coordination, social risk mitigation.</li> </ul> </li> </ul>



<b>1.13.4 Deliverables</b>	<p>The PSP shall be responsible for:</p> <ul style="list-style-type: none"> <li>• Establishment of end-user requirements and condition assessment</li> <li>• Conceptual and detailed design packages, including statutory submissions to Local Authorities;</li> <li>• Procurement support documentation;</li> <li>• Technical specifications and BoQs;</li> <li>• Site administration and contract management;</li> <li>• Reporting (progress, risk, quality, cost, schedule);</li> <li>• Health &amp; Safety compliance;</li> <li>• Social facilitation and stakeholder engagement records;</li> <li>• Final completion and close-out documentation.</li> <li>• Social facilitation and stakeholder management</li> </ul>
<b>1.14 Site Staff</b>	<p>1.14.1 The Service provider to provide details of the Professional Architects / (PA), Quantity Surveyor, Civil &amp; Structural Engineer, Mechanical Engineer, Electrical Engineer, Occupational Health &amp; Safety and Social Facilitator that will be deployed for the implementation of the project.</p> <p>1.14.2 Social Facilitator to be familiar and have deep understanding of the social-economic, political and traditional affairs of the area.</p>
<b>ITEM</b>	<b>DESCRIPTION</b>
<b>1.15 IDT's Reservation of Rights</b>	<p>1.15.1 The Service Providers attention is specifically drawn to the fact that a contract in respect of the services requested herein will not necessarily result from the proposals received.</p> <p>1.15.2 IDT's reservation of rights: IDT reserves the right to cancel or withdraw this request for quotations without prior notice and without furnishing any reasons whatsoever.</p> <p>1.15.3 IDT reserves the right not to award to the lowest bidder.</p>
<b>1.16 Cancellation Cost</b>	<p>1.16.1 <b><u>Should the project be cancelled by the Client Department, for funding and/or other reasons, the IDT and the Client Department shall not be liable to remunerate the service provider for any potential loss of business and/or profit. The service provider shall only be remunerated for work done prior to the cancellation.</u></b></p>
<b>1.17 Contract</b>	<p>1.17.1 The service provider will be expected to enter into contract with the IDT on behalf of Eastern Cape Department of Education.</p>

<p><b>1.18 Bid Document and Contract</b></p>	<p><b>1.18.1</b> The Bidder is advised to get acquainted with all the contents of the bid documents as those will form the basis of the contract to be entered into. Any contents of this document that the bidder requires clarity on shall be brought forward before the bid submission date stipulated in this bid document.</p> <p><b>1.18.2 Conditions of Contract are the CIDB Standard Professional Services Contract 3rd Edition of the CIDB Document 1015.</b></p> <p><b>1.18.3</b> The successful Bidder will be expected to have and maintain a professional indemnity insurance of at least Six Million Rands (R6 000 000.00) combined for all disciplines (two million each). (NB: adequacy or inadequacy of such an insurance will only be re-assessed prior to appointment of a successful service provider and upon conclusion of specific risk assessment)</p>
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## **2. FEE GUIDELINE FOR APPLICABLE PROFESSIONAL SERVICES**

The fees will be calculated as a percentage based on the construction budget/ estimate.

The Rand Value will be used only for adjudication and appointment will be based on percentage fees of the construction budget/estimate.

The hourly rates will be priced on a pricing schedule which is part of this document. Disbursement costs also forms part of the pricing schedule and are guided by the clause above, which pertains to base towns (focal points) for travelling distance and travelling time.

### 3. CONSORTIUM OR MULTI-DISCIPLINARY SERVICES FOR NEW O.R. TAMBO COASTAL DISTRICT OFFICES SITUATED IN PORT ST JOHNS IN THE EASTERN CAPE PROVINCE

#### 3.1. Activity Schedule Payment Arrangements

Over the project life cycle, the Professional Services Fees which are to be paid upon the completion of the respective services and acceptance of the deliverables thereof by IDT are to be proportioned according to the following percentages outlined in the table below. (Fees claimable exclude contingencies and stage 5 to be pro-rated based on construction progress).

**NOTE: Compliance with submission and approval of designs through the Client PAC Stages 1 to 4**

Stage	Stage of Professional Services Rendered	Responsibility of PSP per stages	Percentage of total multi-disciplinary Professional Fees Payable
1	Feasibility report (Condition Assessment Reports)	PSP	5%
2	Site development plans (SDP's), tender prototype design <b>and</b> tender prototype BOQ. Approved SDPs, Design reports, standard prototype drawings and Tender BOQ to be produced as deliverable.	PSP	5%
3	Detailed design, Bills of Quantities, full construction drawings. 1. Site specific detailed designs e.g external works and any design work as required on site. Design report and construction drawings to be produced as deliverable 2. Compile a re-measured BOQ based on site specific detailed designs to determine final cost to completion. Re-measured BOQ to be produced as deliverable	PSP	10%
4.1	Tender documentation, Tender process, evaluation and recommendations for award of construction contracts. Checking and Balancing of Bill of Quantities	IDT & PSP	5%
4.2	Compilation of contract documentation etc, Approval of OHS files etc, Site Handover	PSP	20%
5	Contract Administration and monitoring, OHS compliance monitoring, Construction of services up to Practical Completion & Work Completion 3.	PSP	35%
6	Final Completion	PSP	10%
7	Hand-over, As-built drawings/Asset data and Neims Assessments, Final Accounts and Close-out	PSP	10%
	<b>TOTAL</b>		<b>100%</b>

## SOCIAL FACILITATION FEE STRUCTURE AND THE MONITORING TOOL

STAGE NAME	FDPM STAGE GATE OBJECTIVES	STAGE/GATE NO – FDPM	WHAT TO DO / ACTIVITIES / SUB-PROCESSED	DELIVERABLES	STAGE GATE
1. Initiation - Project Identification	The conceptualisation of priority Community-Mandated projects that meet the local needs through Co-creation and Co-ownership with the local community for Organic solutions.	PJ-S0	<ul style="list-style-type: none"><li>• Conduct a Community workshop</li><li>• Stakeholder engagement</li><li>• Budgeting</li></ul>	<ul style="list-style-type: none"><li>• Community-based plan</li></ul>	5%
				<ul style="list-style-type: none"><li>• Attendance register</li></ul>	
				<ul style="list-style-type: none"><li>• Minutes</li></ul>	
				<ul style="list-style-type: none"><li>• Community-based plan with priority projects</li></ul>	
				<ul style="list-style-type: none"><li>• Government priority programmes</li></ul>	
				<ul style="list-style-type: none"><li>• Integration planning</li></ul>	
				<ul style="list-style-type: none"><li>• Appointment letter</li></ul>	
SUB-TOTAL					
2. Social Development Feasibility study – Non-technical	To develop a Social Development Feasibility study	PJ-S1-A	<ul style="list-style-type: none"><li>• Desktop research and</li><li>• Community Research</li><li>• Site inspection</li></ul>	<ul style="list-style-type: none"><li>• Community Profile and baseline study.</li><li>• Project beneficiation report</li></ul>	5%
SUB-TOTAL					
3. Planning – (Project landing and stakeholder engagement)	Prepare for proper project landing for Co-ownership and Co-Creation.	PJ-S1-B	<ul style="list-style-type: none"><li>• Engagement with local authorities to introduce the project.</li></ul>	<ul style="list-style-type: none"><li>• Local authority engagement report</li></ul>	15%
	Mapping of local community assets for organic development		<ul style="list-style-type: none"><li>• Community mapping.</li></ul>	<ul style="list-style-type: none"><li>• Report on the available local materials and suppliers.</li></ul>	
			<ul style="list-style-type: none"><li>• Stakeholder identification, engagement and analysis</li></ul>	<ul style="list-style-type: none"><li>• Stakeholders engagement report</li><li>• Minutes of stakeholder engagement meeting</li></ul>	
	Establishment of local and representative project governance structures.		<ul style="list-style-type: none"><li>• Establishment and induction of PSC</li></ul>	<ul style="list-style-type: none"><li>• PSC establishment and induction report</li></ul>	
			<ul style="list-style-type: none"><li>• Appointment and induction of CLO</li></ul>	<ul style="list-style-type: none"><li>• CLO recruitment report</li></ul>	
	Engagement with local authorities to introduce the project. Community mapping.		<ul style="list-style-type: none"><li>• Introduce PSC and CLO to the contractor</li></ul>	<ul style="list-style-type: none"><li>• Project site handover attendance register and minutes</li></ul>	
			<ul style="list-style-type: none"><li>• Reporting writing</li></ul>	Detailed Social Facilitation Plan.	
	SUB-TOTAL				
4. Procurement - community empowerment	To profile the community and map basic assets that are mainly impact/ed by the project.	PJ-S1-8	<ul style="list-style-type: none"><li>• Local community assets mapping (Local materials and suppliers)</li></ul>	<ul style="list-style-type: none"><li>• Community profile report.</li><li>- database for local suppliers of materials</li></ul>	20%

STAGE NAME	FDPM STAGE GATE OBJECTIVES	STAGE/GATE NO – FDPM	WHAT TO DO / ACTIVITIES / SUB-PROCESSED	DELIVERABLES	STAGE GATE
			<ul style="list-style-type: none"> <li>Engagement with stakeholders (Contractor, community, PSC, CLO for worker recruitment plan.</li> </ul>	<ul style="list-style-type: none"> <li>Determine the local recruitment strategy</li> <li>Database of local workers</li> <li>Required workers and- skills</li> </ul>	
	Planning for impactful job creation and community empowerment			<ul style="list-style-type: none"> <li>Recruitment and placement of workers (local participants)</li> <li>Establishment of databases for trades which are identified for community upliftment (SMME Development)</li> </ul>	
	Skills development and training (for <u>co-creation</u> and <u>co-ownership</u> )		<ul style="list-style-type: none"> <li>Skills analysis</li> </ul>	<ul style="list-style-type: none"> <li>Skills analysis and training needs report for specific projects.</li> </ul>	
	Enterprise development support		<ul style="list-style-type: none"> <li>Facilitation of local supply of materials</li> </ul>	<ul style="list-style-type: none"> <li>Procurement strategy</li> </ul>	

**SUB-TOTAL**

5. Implementa tion	Job Creation	PJ-S5	CONTINUOUS: <ul style="list-style-type: none"><li>Recruitment of local workers / participants</li></ul>	MONTHLY REPORT ON: <ul style="list-style-type: none"><li>Local Worker / Participants recruitment report</li></ul>	45%
				<ul style="list-style-type: none"><li>Job creation report</li></ul>	
	Local enterprise development support		<ul style="list-style-type: none"><li>Facilitation of transaction of materials between the enterprises and the project.</li><li>Ensure sub-contracting of local SMMEs (utilisation of established databases)</li></ul>	<ul style="list-style-type: none"><li>Local suppliers' procurement report</li><li>Impact assessment report</li></ul>	
	Risk conflict management		<ul style="list-style-type: none"><li>Meetings with Stakeholders (PSC, Community, CLO and contractor, IDT).</li></ul>	<ul style="list-style-type: none"><li>Risk management plan and report</li></ul>	
				<ul style="list-style-type: none"><li>Database of local workers participants</li></ul>	
				<ul style="list-style-type: none"><li>Issue log</li></ul>	
				<ul style="list-style-type: none"><li>Conflict management report</li></ul>	
	Continuous Monitor the project implementation process (and consideration of social and economic developmental imperatives; Monitoring community change management.		<ul style="list-style-type: none"><li>Meetings with Stakeholders (PSC, Community, CLO and contractor, IDT).</li></ul>	<ul style="list-style-type: none"><li>Stakeholder engagement report</li></ul>	
				<ul style="list-style-type: none"><li>Attendance register</li></ul>	
				<ul style="list-style-type: none"><li>Minutes of meetings</li></ul>	
<ul style="list-style-type: none"><li>Progress report</li></ul>					
<ul style="list-style-type: none"><li>Local business development support report.</li></ul>					

STAGE NAME	FDPM STAGE GATE OBJECTIVES	STAGE/GATE NO – FDPM	WHAT TO DO / ACTIVITIES / SUB-PROCESSED	DELIVERABLES	STAGE GATE
				<ul style="list-style-type: none"> <li>• Community development monitoring/change report</li> <li>• Risk management report</li> <li>• Community engagement for feedback</li> <li>• PSC and CLO report</li> <li>• Meeting Attendance Registers</li> <li>• Programme evaluation</li> <li>• Lessons learned report</li> </ul>	
SUB- TOTAL					
6. Handover and – (Project closure)	To handover the SF project to the client with the final report		<ul style="list-style-type: none"> <li>• Stakeholder engagement – communities and beneficiaries</li> <li>To facilitate project closure, and reporting</li> </ul>	<ul style="list-style-type: none"> <li>• Minutes and attendance registers of meetings with stakeholders</li> <li>• SF closeout report</li> <li>• SF Programme evaluation report</li> <li>• Lessons learnt report</li> <li>• Reviewed SF Framework</li> <li>• Final SF Closeout report</li> </ul>	10%
SUB- TOTAL					

Table 3.2. PRICING SCHEDULE

PRICE SCHEDULE			
PRICING SCHEDULE: REQUEST FOR PROPOSALS FOR A CONSORTIUM OR MULTI-DISCIPLINARY PROFESSIONAL SERVICES CONSISTING OF ARCHITECTS (PA), QUANTITY SURVEYORS, CIVIL & STRUCTURAL ENGINEERS, ELECTRICAL & MECHANICAL ENGINEERS, OCCUPATIONAL HEALTH AND SAFETY AGENTS AND SOCIAL FACILITATORS FROM STAGE 1 TO STAGE 6 FOR THE CONSTRUCTION OF NEW O.R. TAMBO COASTAL DISTRICT OFFICES SITUATED IN PORT ST JOHNS IN THE EASTERN CAPE PROVINCE			
O.R. Tambo Coastal District Offices Estimated Construction Value R 85 000 000.00 (Excl. VAT)			
No.	Description		Amount (R) (Excl. Vat)
A	Professional Services (Fees % x Estimated Construction Value) Stage 1 to Stage 7 (PSP to indicate % for each discipline for risk assessment purposes)		
	Role of Consultant	Discipline specific fee %	
A1	Principal Agent and Project Administrator		
A2	Architect		
A3	Quantity surveyor		
A4	Civil & Structural Engineer		
A5	Electrical & Mechanical Engineer		
A6	Social Facilitator		
A7	Health and Safety Agent		
		Subtotal	
B	CIDB BUILD Programme		R
	Disbursements/Recoverable expenses		
C	Recoverable Expenses (Typing and Printing) @ R 50 000.00		R 50 000.00
D	Recoverable Travelling Disbursements @ R 300 000.00 to be claimed according to DPW rates from base town. Minimum of x 3 visits per month		R 300 000.00
	Fees & Specialist Services (Other Recoverable expenses)		
E	Allowance for Professional Specialists Services @ R100 000.00		
	Handling fee claimable deemed to be part of Architect fees and payment will be claimed directly through the Architect Consultant.		
	Subtotal		
	Total Offer (Excl. VAT)		
	Vat @ 15%		
	TOTAL OFFER (TO BE CARRIED FORWARD TO FORM OF OFFER) (INCL. VAT)		

**Table 3.3: TOTAL TO FORM OF OFFER – SUM OF FEES & DISBURSEMENTS VAT INCLUSIVE**

**O.R. TAMBO COASTAL DISTRICT OFFICES:**

<b>PROFESSIONAL FEES &amp; DISBURSEMENT COST</b>	<b>TOTAL TO FORM OF OFFER</b>
R	R



FORM OF OFFER AND ACCEPTANCE

The employer, identified in the acceptance signature block, has solicited offers to enter into a contract for the procurement of:

REQUEST FOR PROPOSALS FOR A CONSORTIUM OR MULTI-DISCIPLINARY PROFESSIONAL SERVICES CONSISTING OF ARCHITECTS (PA), QUANTITY SURVEYORS, CIVIL & STRUCTURAL ENGINEERS, ELECTRICAL & MECHANICAL ENGINEERS, OCCUPATIONAL HEALTH AND SAFETY AGENTS AND SOCIAL FACILITATORS FROM STAGE 1 TO STAGE 6 FOR THE CONSTRUCTION OF NEW O.R. TAMBO COASTAL DISTRICT OFFICES SITUATED IN PORT ST JOHNS IN THE EASTERN CAPE PROVINCE

The tenderer, identified in the offer signature block, has examined the documents listed in the tenderdata and addenda thereto as listed in the returnable schedules, and by submitting this offer has accepted the conditions of tender.

By the representative of the tenderer, deemed to be duly authorized, signing this part of this form of offer and acceptance, the tenderer offers to perform all of the obligations and liabilities of the contractor under the contract including compliance with all its terms and conditions according to their true intent and meaning for an amount to be determined in accordance with the conditions of contract identified in the contract data.

THE OFFERED TOTAL OF THE PRICES INCLUSIVE OF VALUE ADDED TAX IS:

.....  
.....

Rand (in words); R .....(in figures) **INCLUDING VAT**

This offer may be accepted by the employer by signing the acceptance part of this form of offer and acceptance and returning one copy of this document to the tenderer before the end of the period of validity stated in the tender data, whereupon the tenderer becomes the party named as the contractor in the conditions of contract identified in the contract data.

Signature ..... Date .....

Name ..... Identity number .....

Capacity .....

**for the tenderer**  
(Name and .....

...  
address of  
organization) .....

...  
Name and  
signature of  
witness .....

**NOTE:** The bidder is to ensure that all pricing from the above table(s) is transferred (i.e. the total offered price) to the **Form of Offer hereunder** (Note: Failure to complete and sign the Form of Offer in Full by an authorized person shall invalidate the bid)

## TENDER / QUOTATION DATA

Clause number	<b>REQUEST FOR PROPOSALS FOR A CONSORTIUM OR MULTI-DISCIPLINARY PROFESSIONAL SERVICES CONSISTING OF ARCHITECTS (PA), QUANTITY SURVEYORS, CIVIL &amp; STRUCTURAL ENGINEERS, ELECTRICAL &amp; MECHANICAL ENGINEERS, OCCUPATIONAL HEALTH AND SAFETY AGENTS AND SOCIAL FACILITATORS FROM STAGE 1 TO STAGE 6 FOR THE CONSTRUCTION OF NEW O.R. TAMBO COASTAL DISTRICT OFFICES SITUATED IN PORT ST JOHNS IN THE EASTERN CAPE PROVINCE</b>
1	<b>The Employer is Independent Development Trust (IDT) on behalf of Eastern Cape Department of Education</b>
2	<b>Inspections, Tests and Analysis</b> Access shall be provided for inspections, tests and analysis as may be required by the employer.
3	<b>Contract period:</b> <b>TBC.</b>
4	<b>Central Supplier Database (CSD) on Tax Compliance</b> No contract may be awarded to a person who has non-compliant tax status found on CSD or South African Revenue Service ("SARS") certifying the taxes of that person to be in order or that suitable arrangement have been made with SARS"
5	<b>Closing of Quotation Submissions</b> Quotation documents shall be <b>hand delivered</b> in 1 combined pack ( <i>i.e Bid document and its accompanying Annexures</i> ) to the <i>Implementing Agent (IDT)</i> , and shall be marked as follows: <b>The Independent Development Trust (IDT)</b> EC Regional Office Palm Square Business Park Silverwood House, Bonza Bay Road, Beacon Bay EAST LONDON  <b>Marked confidential Quotation and Indicate the Following:</b> <b>IDTECRFP/71/DOE/CTM/2025/26</b>
6	<b>Evaluation of Quotation Offers</b> The bidders will be evaluated on specific goals (preference) point scoring and the price as per the IDT 80/20 score card.  A contract may, on reasonable and justifiable grounds, be awarded to a bidder that did not score the highest number of aggregate points where the IDT is managing risk, i.e. where the bidder has underpriced such that, the project may be compromised by such underpricing or in spreading of work to other bidders in case where the highest points scorer has already been awarded work.

7	<p><b>Acceptance of Quotation Offers</b></p> <p>Tender offers will only be accepted if:</p> <ul style="list-style-type: none"> <li>a) Central Supplier Database (CSD) on Tax Compliance no contract may be awarded to a person who has non-compliant tax status found on CSD or South African Revenue Service ("SARS") certifying the taxes of that person to be in order or that suitable arrangement have been made with SARS"</li> <li>b) the tenderer has completed the Declaration of Interest and there are no conflicts of interest which may impact on the tenderer's ability to perform the contract in the best interests of the employer or potentially compromise the tender process and persons in the employ of the state are not permitted to submit tenders or participate in the contract;</li> <li>c) Completed and signed <b>ALL SBD Forms</b></li> <li>d) The <b>FULLY</b> completed pricing schedule provided herewith this document</li> <li>e) The <b>FULLY</b> completed in full, signed and witnessed form of offer;</li> <li>f) The company is registered on the IDT's Panel of Professional Electrical Engineering Consultants</li> <li>g) The valid Professional registration of the resource to be allocated by the QS for this task.</li> </ul>
8	<p><b>Seek clarification</b></p> <p>Request clarification of the tender documents (if necessary) by emailing the employer <b>at least three- working days before the Closing Date</b> stated in the terms of reference.</p>
9	<p><b>The additional conditions of tender are:</b></p> <p>The employer is not obliged to accept the lowest bidder.</p>
10	<p><b>Notice to Unsuccessful Bidders</b></p> <p>Should the bidders not hear from IDT within 21 days from the quotation closure day i.e. submission date of the quotation they should consider their submission unsuccessful. No written notification will be issued by the Employer to unsuccessful bidders.</p>
11	<p><b>The Contract:</b></p> <p>The Quotation Document is the part of the contract document and the copy to be submitted to the successful bidder.</p>

### LIST OF RETURNABLE DOCUMENTS

List of returnable documents are for ensuring that everything the employer requires atenderer to submit with his tender is included in, or returned with, his tender submission. Tick below if returnable document is attached or completed properly.

ITEM	LIST OF RETURNABLE DOCUMENTS	TICK IF ATTACHED
1.	Central Supplier Database (CSD) Report	
2.	Proof of Professional Registration, Valid Letter of Good Standing with Professional Body and CVs	
3.	Invitation to Bid (SBD1)	
4.	Bidders Disclosure (SBD4)	
5.	Preference Points Claim Form in terms of the Preferential Procurement (SBD 6.1)	
6.	Fully Completed Fee & Disbursement Pricing Schedule	
7.	Fully Completed Form of Offer	
8.	Professional Indemnity – Minimum of R2 000 000.00 per discipline	
9.	Authority to Sign a Bid Document if there is more than one director.	

**DECLARATION THAT INFORMATION ON CENTRAL SUPPLIER DATABASE (CSD) IS CORRECT AND UP TO DATE**  
(To be completed by bidder)

**THIS IS TO CERTIFY THAT I (name of bidder/authorized representative)**

.....

**WHO REPRESENTS (state name of bidder)?**

.....

**I AM AWARE OF THE CONTENTS OF THE CENTRAL SUPPLIER DATABASE WITH RESPECT TO THE BIDDER'S DETAILS AND REGISTRATION INFORMATION, AND THAT THE SAID INFORMATION IS CORRECT AND UP TO DATE AS ON THE DATE OF SUBMITTING THIS BID.**

**AND I AM AWARE THAT INCORRECT OR OUTDATED INFORMATION MAY BE A CAUSE FOR DISQUALIFICATION OF THIS BID FROM THE BIDDING PROCESS, AND/OR POSSIBLE CANCELLATION OF THE CONTRACT THAT MAY BE AWARDED ON THE BASIS OF THIS BID.**

.....  
**SIGNATURE OF BIDDER OR AUTHORISED REPRESENTATIVE**

**DATE:** .....

## ***TAX CLEARANCE***

### **IMPORTANT NOTES:**

1. The following is an abstract from the Preferential Procurement Regulations, 2017 promulgated with the Preferential Policy Framework Act No 5 of 2000:

#### **"CSD Tax Compliance**

No contract may be awarded to a person who has non-compliant tax status found on CSD or South African Revenue Service ("SARS") certifying the taxes of that person to be in order or that suitable arrangement have been made with SARS"

**Failure to comply with CSD tax compliance will inevitably invalidate the quotation.**

**PART A  
INVITATION TO BID**

**YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (INDEPENDENT DEVELOPMENT TRUST (IDT))**

BID NUMBER:	<b>IDTECRFP/71/DOE/CTM/2025/26</b>	CLOSING DATE:	<b>23 February 2026</b>	CLOSING TIME:	<b>12:00</b>
DESCRIPTION	REQUEST FOR PROPOSALS FOR A CONSORTIUM OR MULTI-DISCIPLINARY PROFESSIONAL SERVICES CONSISTING OF ARCHITECTS (PA), QUANTITY SURVEYORS, CIVIL & STRUCTURAL ENGINEERS, ELECTRICAL & MECHANICAL ENGINEERS, OCCUPATIONAL HEALTH AND SAFETY AGENTS AND SOCIAL FACILITATORS FROM STAGE 1 TO STAGE 6 FOR THE CONSTRUCTION OF NEW O.R. TAMBO COASTAL DISTRICT OFFICES SITUATED IN PORT ST JOHNS IN THE EASTERN CAPE PROVINCE				

**BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)**

**INDEPENDENT DEVELOPMENT TRUST**

**SILVERWOOD OFFICE PARK**

**BONZA BAY ROAD, BEACON BAY**

**EAST LONDON**

**BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO**

**TECHNICAL ENQUIRIES MAY BE DIRECTED TO:**

CONTACT PERSON	<b>Zanele Madzidzela</b>	CONTACT PERSON	<b>Bonga Boo</b>
E-MAIL ADDRESS	<a href="mailto:zanelem@idt.org.za">zanelem@idt.org.za</a>	E-MAIL ADDRESS	<a href="mailto:bongab@idt.org.za">bongab@idt.org.za</a>

**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

**SBD 6.1 REQUIREMENT MUST BE COMPLIED TO CLAIM POINTS ON SPECIFIC GOALS**

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

**QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS**

IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?	<input type="checkbox"/> YES <input type="checkbox"/> NO
DOES THE ENTITY HAVE A BRANCH IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?	<input type="checkbox"/> YES <input type="checkbox"/> NO
<b>IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.</b>	

PART B

TERMS AND CONDITIONS FOR BIDDING

<b>1. BID SUBMISSION:</b>
1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
1.2. <b>ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.</b>
1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022, 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: .....



**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<sup>1</sup> in the enterprise, employed by the state? **YES/NO**

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

Full Name	Identity Number	Name of 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

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.

arrangement with any competitor. However, communication between partners in a joint venture or consortium<sup>2</sup> will not be construed as collusive bidding.

- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.  
I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM  
INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM  
SHOULD THIS DECLARATION PROVE TO BE FALSE.

..... Signature	..... Date
..... Position	..... Name of bidder

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

## 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 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:

- (d) Price; and
- (e) Specific Goals.

### 1.4 To be completed by the organ of state:

The maximum points for this are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Women	6
Youth	6
People with Disabilities	4
Black People	4
<b>Total points for Price and SPECIFIC GOALS</b>	<b>100</b>

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:

80/20	or	90/10
$Ps = 80 \left( 1 - \frac{Pt - P_{min}}{P_{min}} \right)$	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:

80/20	or	90/10
$Ps = 80 \left( 1 + \frac{Pt - P_{max}}{P_{max}} \right)$	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		6	N/A	
Youth		6	N/A	
People with Disabilities		4	N/A	
Black People		4	N/A	

**Source Documents to be submitted with the Bid or RFQ**

\*CSD 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:** .....

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