



3233 Nokukhanya Luthuli Street
Groutville KwaZulu - Natal
South Africa
PO Box 1869,
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tel. (032) 559 6822
fax. (032) 559 6806
email: luthulimuseum@luthulimuseum.org.za
website: www.luthulimuseum.org.za

RFQ NUMBER	RFQ LM 2025/0059
RFQ DESCRIPTION	THE APPOINTMENT OF A CONSORTIUM OF PROFESSIONALS FOR THE CONSTRUCTION OF A PARAPLEGIC LIFT AT THE NOKUKHANYA LUTHULI RESOURCE CENTRE BUILDING
RFQ ISSUE DATE	FRIDAY, 13 JUNE 2025
COMPULSORY BRIEFING SESSION	FRIDAY, 20 JUNE 2025 AT 10H00 (Persons arriving after 10h15 will not be considered as having attended the compulsory briefing session)
CLOSING DATE & TIME	FRIDAY, 27 JUNE 2025 AT 10H00
LOCATION FOR SUBMISSIONS	scmofficer@luthulimuseum.org.za
NUMBER OF DOCUMENTS	1 SOFT COPY

For enquiries, please contact scmofficer@luthulimuseum.org.za **before closing date of the RFQ.**

The Luthuli Museum request your quotation on the services listed above. Please furnish us with all the information as requested and return your quotation on the date and time stipulated above. **Late and incomplete submissions will invalidate the quotation submitted.**

SUPPLIER NAME:

NATIONAL TREASURY (CSD) SUPPLIER NUMBER:

POSTAL ADDRESS:

CELL/ TELEPHONE NO:

EMAIL ADDRESS:

CONTACT PERSON:

SIGNATURE OF BIDDER:

SUPPLIER REGISTRATION ON CSD

Prospective suppliers must register on the National Treasury Central database in terms of National Treasury circular no 4A of 2016/17. The bidder must register prior to submitting a proposal/bid.



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RETURNABLE DOCUMENTS CHECKLIST

Quotation invitation document must be completed, signed and submitted by the authorised Company representative. All forms must be properly completed; list below serve as a checklist of your RFQ submission.

(Tick in the relevant block below)

DESCRIPTION	YES	NO
Central Supplier Database Registration Report		
Pricing Schedule / Quotation		
Valid SARS Tax Pin		
BBBEE Affidavit/ Certificate		
CIPC Registration Documents		
Director (s) Certified ID Copy		
Traceable Reference Letters or Completion Certificates (Multi-Disciplinary)		
CVs and Qualifications of Key Personnel		
Proof of Accreditation or Qualification with QSCSA and ECSA		
Public Liability Insurance		
Letter of Good Standing		
SBD 4 – Bidder Declaration		
SBD 6.1 – Preferential Procurement Claim Form		
Methodology on the scope of work		

Note: This RFQ must be completed and signed by the authorised company representative.



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LUTHULI MUSEUM RFQ CONDITIONS

1. QUOTATION CONDITIONS

- a) **Luthuli Museum** does not bind itself to accept the lowest or any RFQ, nor shall it be responsible for or pay any expenses or losses which may be incurred by the bidder in the preparation and delivery of the RFQ.
- b) No RFQ shall be deemed to have been accepted unless and until a formal contract/letter of intent is prepared and executed.
- c) **Luthuli Museum** reserves the right to:
 - I. Not evaluate and award RFQ that do not comply strictly with the requirements of this RFQ.
 - II. Select solely on the information received in the RFQs and Enter into negotiations with any one or more of the preferred bidders(s) based on the criteria specified in the evaluation of this RFQ.
 - III. Contact any bidder during the evaluation process, to clarify any information, without informing any other bidders, and no change in the content of the RFQ shall be sought, offered, or permitted.
 - IV. Award a contract to one or more bidder(s).
 - V. Withdraw the RFQ at any stage
 - VI. Accept a separate RFQ or any RFQ in part or full at its own discretion.
 - VII. Cancel this RFQ or any part thereof at any stage as prescribed in the PPPFA regulation.
 - VIII. Select the bidder(s) for further negotiations based on the greatest benefit to **Luthuli Museum** and not necessarily based on the lowest costs

2. COST OF BIDDING

The bidder shall bear all costs and expenses associated with the preparation and submission of its RFQ, and the **Luthuli Museum** shall under no circumstances be responsible or liable for any such costs, regardless of, without limitation, the conduct or outcome of the bidding, evaluation, and selection processes.



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INTRODUCTION

The Luthuli Museum has a relatively new building named The Nokukhanya Luthuli Resource Centre that needs to provide access for individuals living with physical challenges. This will be achieved through the construction of an electrically powered paraplegic lift next to the main entrance of the Resource Centre. The design concept and detailed design drawings have been produced by an Architect and will be made available for reference to the appointed Service Provider.

The Luthuli Museum therefore seeks to appoint an experienced and qualifying consortium of professionals for the implementation of the paraplegic lift construction project. The Principal Agent together with the professionals shall take over the design drawings and carry the process to tender stage, planning, compile project specifications, bill of quantities, project implementation plan, and oversee the overall construction up to completion of the project.

Considering the above, the Museum wishes to procure the services of a suitably qualifying and experienced consortium of professional specialists, on a once off basis.

SPECIAL CONDITIONS

1. No sub-contracting will be permitted without the approval and consent of the Project Officer due to knowledge and experience required in order to render an effective service towards the professional work.
2. Once appointed, no additional costs incurred by Specialist will be accepted by the Museum. Therefore, all anticipated costs should be included in this quotation.
3. The successful specialist will be required to submit a Letter of Good Standing in terms of COIDA; or his/her latest assessment and proof of payment thereof; or proof of registration with the Compensation Commissioner (only in cases of a new registration), prior to commencement of work.
4. The specialist must take all necessary precautions to ensure that he/she complies in all respects with the environmental safety legislation and all other relevant Occupational Health and Safety Act (OHSA) regulations.



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TERMS OF REFERENCE

APPOINTMENT OF A CONSORTIUM OF PROFESSIONALS FOR THE CONSTRUCTION OF A PARAPLEGIC LIFT AT THE NOKUKHANYA LUTHULI RESOURCE CENTRE BUILDING

1. BACKGROUND AND DISCUSSION

1.1 The luthuli museum has identified and prioritized the need to appoint a suitably qualifying and experienced consortium of professionals for the construction of a paraplegic lift at the nokukhanya luthuli resource centre building

2. PROJECT DESCRIPTION

2.1 The project will be executed in 6 stages which the consortium will be expected to assist the Museum achieve.

These stages are:

- Stage 1: Project inception and briefing
- Stage 2: Concept (feasibility) and viability (cost estimates)
- Stage 3: Design development and approval
- Stage 4: Tender document and procurement
- Stage 5: Execution (Construction and contract administration)
- Stage 6: Close out (as-built)

The specialists will be required to sign off the relevant design drawings for submission and approval by the local municipality for compliance purposes. Therefore, only relevant and professionally registered individuals should be appointed in the team.

3. PURPOSE OF PROJECT

The purpose of the project and RFQ is to:

- Set out the rules of participation in the Bid process referred to in this RFQ.
- Disseminate information on the Project contemplated in this RFQ.
- Provide guidance to Bidders on the preparation of their pricing.
- Provide information to Bidders that is verifiable for the purposes of appointing a qualifying and experienced specialist.

Enable the museum to select professional specialists that:

- a) Are technically and financially qualified and meet the empowerment criteria described in this RFQ.
- b) Have sufficient experience in similar work.
- c) Have commitment and resources to provide the services required in this RFQ; and
- d) Carry all the obligations of the Contract.



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4. SCOPE OF WORK

The role of the appointed consortium of professionals will be to assist the Luthuli Museum

- Confirm and interpret the scope of project with the Museum
- Study the concept and detailed design drawings
- Coordinate with key stake-holders
- Compile a comprehensive and compact tender document for procurement of contractor
- Compile Bill of Quantities (BOQ) for all required work including structural, mechanical, electrical, etc.
- Provide assistance and guidance during tender stage.
- Monitor and ensure compliance and quality control
- Conduct project close-out (as-built)

5. OWNERSHIP OF DESIGN

The plans and design developed and to be provided by Luthuli Museum shall at all times remain the property of Luthuli Museum.

6. REQUIREMENTS FROM PREFERRED BIDDER

The following Professionals are required as part of the consortium to draft project specifications:

- Architect – Principal Agent
- Mechanical Engineering (incl. Fire Rational Design)
- Electrical Engineer
- Structural Engineering
- Quantity Surveyor
- Project Management expertise

The above list of services may not be exhaustive regarding services required for the above project, where other disciplines may be required to undertake specialist studies or investigations in addition and including those listed above (Fire Engineer). This would be catered for as a disbursement for the appointed consortium of consultants.

7. EXPERIENCE AND COMPETENCY

Bidders are required to demonstrate in their RFQs the following:

- (a) Demonstrate previous experience of in providing similar work or services and must attach 3 letters of referral from previous client.
- (b) Demonstrate the capacity to handle a Project of this magnitude in terms of the human resource, skills, financials and equipment.
- (c) Demonstrate that they are familiar with all regulatory framework that relates to this Project including but not limited to, Occupational Health and Safety Act.

NB: All professionals should be registered with their respective professional bodies e.g. Engineering Council of South Africa (ECSA); South African Institution of Civil Engineering (SAICE); and any other relevant professional body)

Architect	-	South African Council for the Architectural Profession
Mechanical Engineering	-	Engineering Council of South Africa
Electrical Engineer	-	Engineering Council of South Africa
Structural Engineering	-	Engineering Council of South Africa
Quantity Surveyor	-	South African Council for Quantity Surveying



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8. EXPECTED DELIVERABLES FROM PREFERRED BIDDER/S

- (a) Interpret the requirements specified by the Museum and concept design.
- (b) Adopt existing detailed design and compile detailed project specifications.
- (c) Compile a comprehensive Bill of Quantities (BOQ) for the various disciplines to produce a functioning lift.
- (d) Carry out work stages from tender through to project completion.
- (e) Ensure that pricing is based on recent gazetted fees and includes stages (1-6).

8.1 List of expected deliverables for the overall project

The project scope in no particular order includes:

- Assuming the role of assisting the Museum implement the project.
- Validate existing drawings in collaboration with the Museum and Architect and where necessary formulate new drawings that may be required for municipal submissions and approvals.
- Adopt scope of work from the Museum.
- Conduct a building assessment and the required construction and compliance requirements.
- Produce comprehensive tender and construction drawings.
- Provision of recommendations on electrical upgrades and load requirements.
- Compile a comprehensive Bill of Quantities (BOQ) with mechanical, electrical, civil/structural scope for a fully functional, interactive and integrated Mechanical system for the lift, electrical wiring and lighting, fire detection and mitigation.
- Testing and commissioning of work.
- Compile a tender document using the CIDB standards and incorporating the terms and condition of the GCC, JBCC and all relevant contract on the tender document.
- Conduct site briefing meeting.
- Assess and approve tests and completed work in stages (i.e. foundations, concrete cube tests, etc.)
- Assist guide the Museum during Bid Evaluation of tender documents.
- Prepare the signing of GCC contract between the Museum and contractor.
- Assist Project Officer with Project Management of the project during construction.
- Conduct biweekly/monthly site inspections and progress meetings.
- Assist measure work and prepare payment certificates for the contractor.
- Issue site instructions.
- Assist monitor the project programme and budget.
- Implement all professional practice design stages of all listed consultants and monitor construction stage according to SACPCMP.
- Assist in ensuring all the design, material, and construction work comply with SABS, SANS, etc.
- Assist in compilation of manuals for the Museum.
- Issue all relevant documentation, including equipment warranties, workmanship, compliance certification, etc is timeously submitted by the appointed contractor(s).
- Produce and sign off as-built drawings in accordance with the installations, design drawings, Occupational Health and Safety Act (OHSA), South African National Standards (SANS), payment certificate(s) and the handover the completed installation. Supervision and monitoring the appointed Contractor during installation and approval of work including mechanical.
- Provide a comprehensive close out report.
- Sign off and submit the plans to the municipality for approval



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The reports, designs, specifications and drawings produced by the specialists on behalf of the Luthuli Museum shall be issued to the Luthuli Museum and shall become part of the Museum's assets. The Museum may use and copy these for any purpose connected with the construction arrangements/installations, use, alterations or demolitions as part of its asset management purposes in the future.

NB: The Specialists are required to submit a detailed proposed methodology of how they will conduct and complete the project. The methodology must be attached and submitted together with the priced quotation.

9. CONTACT DETAILS

Responses to RFQ must provide the name and contact details of its Authorised Representative in its covering letter to the Responses to RFQ. The Authorised Representative shall be the primary contact person used by the Museum for correspondence and communication during the RFQ Process.

The following contact details of the Authorised Representative must be provided:

- | | | |
|---------------------|---------------------|---------------------|
| a) Name | d) Mobile number | g) Physical address |
| b) Designation | e) Facsimile number | h) Postal address |
| c) Telephone number | f) E-mail address | |

Luthuli Museum accepts no liability for any failure by the Responses to RFQ to receive information or communication from Luthuli Museum where the contact details of the Authorised Representative are incorrect or have changed. Any changes to the Authorised Representative's contact details or any substitution of the Authorised Representative must immediately be conveyed to Luthuli Museum in terms of the Communication Structure.

10. COMMUNICATION STRUCTURE

During the RFQ process, bidders must strictly adhere to the Communication Structure. All requests for clarifications, queries, questions or comments as well as all requests for communication or interaction with Luthuli Museum must be directed in writing to **SCM Officer** at the following email address scmofficer@luthulimuseum.org.za on or before 26 June 2025.

11. CONSORTIUM CHANGES

If exceptional circumstances should arise after the submission of the bid and after the closing date of submission of bids, there is change in the composition of the Bidder, either through substitution or omission of any member of the Bidder:

- The Response to RFQ must notify the Museum in writing of the proposed changes supported by complete details of the material reasons for the changes, the parties impacted by the changes and the impact on the response to RFQ.
- Luthuli Museum shall evaluate the reasons advanced by the Bidder for the requested changes to the Bidder structure and where Luthuli Museum is not satisfied that the reasons advanced are reasonable or material, refuse to accept the change and disqualify the response to RFQ, or notify the Bidder in writing of its non-acceptance of the changes and require the Bidder to propose a suitable alternative to Luthuli Museum within 10 (TEN) days of its receipt of the decision of Luthuli Museum, upon receipt of which the Luthuli Museum shall -
- Evaluate the alternative proposed for suitability to the Luthuli Museum, and where the alternative is accepted by Luthuli Museum, inform the Bidder in writing of such acceptance and the Luthuli Museum shall reassess the response to RFQ against the RFQ requirements and criteria; or
- Where the alternative is not accepted by the Luthuli Museum, inform the Bidder in writing of such non-acceptance as well as its disqualification from the RFQ Process.
- Where Luthuli Museum is satisfied that the changes requested under (i) above are reasonable and material, the response to RFQ, shall be allowed to effect the required changes and Luthuli Museum shall reassess the response to RFQ against the RFQ requirements and criteria.



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PRICING SCHEDULE

Name of Bidder: RFQ Number:

Closing Date:

The Luthuli Museum requests services from a consortium of specialists for the project design, specification and project management for the construction of a paraplegic lift at the Nokukhanya Luthuli Resource Centre, Luthuli Museum. You are therefore requested to provide a quotation as per the specification below.

PRICING SCHEDULE

The Specialists price must include all expenses; disbursements and costs (e.g. professional fees for design, bill of quantities compilation, equipment, material, consumables, testing, commissioning, etc.) that may be required in and for the execution of the work described in the specification, and shall cover the cost of all general risks, liabilities and obligations set forth or implied in the contract as well as overhead charges and profit (in the event that the submission is successful). The tendered price will be fixed, final and binding.

Each bidder is required to complete and submit the Pricing Schedule. Additional price components not included in the Pricing Schedule should be clearly itemized below.

The appointed specialist will be required to carry out the scope of work as per the approved proposal and the work will be expected be completed within a time frame of **90 days** after receipt of appointment letter.

ITEM	DESCRIPTION	UNIT	QUANTITY	RATE	AMOUNT ONCE OFF
1.	Total Tendered price for holistic professional services as per the project specification and scope of work	Sum	1		
2.	Disbursements	Sum	1		
SUB-TOTAL					
15% VAT					
GRAND TOTAL					

NB: Please also provide a schedule of estimated standard disbursements, including rate/km for travelling costs. Disbursement would be paid for on a proven cost basis.

a) Valid for the tender period of [90 days].

Bidders are required must ensure that their pricing:

b) Bidders are required to submit together with their RFQ a tender for the execution of the services as outlined on a fixed % fee for the individual professional discipline service costs. The specialists should also indicate the list of professionals to be involved, qualifications, professional registration and responsibility. The tender price should also include all the standard disbursements (clearly stated) anticipated. Please refer to a sample of the required schedule below



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SCHEDULE OF PROPOSED TEAM

NAME OF THE FIRM/SPECIALIST	PROFESSIONAL STATUS	% BREAKDOWN
	Total Percentage	%

The Bidder warrants that the pricing quoted above is free of any errors and omissions and that he/she is able to deliver the service on the price Quoted.

SIGNATURE :

NAME OF DELEGATED SIGNATORY :
(PRINT)

in his capacity of

DESIGNATION OF SIGNATORY :
(PRINT)

who warrants his authority to sign on behalf of

NAME OF BIDDER (COMPANY) :



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RETURNABLE DOCUMENTS

NOTE: The Bidder is required to complete each schedule listed below to the best of his ability as the evaluation of tenders and the eventual contract will be based on the information provided by the bidder. Failure of a Bidder to complete the schedules and forms to the satisfaction of the Museum will inevitably prejudice the RFQ and may lead to rejection on the grounds that the RFQ is not responsive.

The bidder must complete and or submit the following returnable documents:

RETURNABLE DOCUMENTS			
PART A: TECHNICAL RETURNABLES			
Returnable Schedules required only for Tender Evaluation Purposes.			
Description		Submitted (please tick)	
		Yes	No
1.	Company profile		
2.	Projects list		
3.	Reference letters or Completion certificates		
4.	CV of Architect		
5.	CV of Structural Engineer		
6.	CV of Electrical Engineer		
7.	CV of Mechanical Engineer		
8.	CV of Quantity Surveyor (QS)		
9.	Proof of registration with QSCSA, and ECSA		
10.	SBD 4		
11.	SBD 6.1		
PART B: PRICING PROPOSAL			
Returnable Schedules that will be incorporated into the Contract.			
12.	Cover letter		
13.	Tax Clearance Certificate		
14.	Completed Price Schedule		
15.	Valid B-BBEE certificate or sworn affidavit		
16.	CSD Registration Report		
17.	Consortium Agreement (signed by individual specialists)		
18.	Proof of bank account		

THE SPECIALISTS ARE REQUIRED TO ATTEND A COMPULSORY SITE INSPECTION MEETING AT THE LUTHULI MUSEUM AT THE ADDRESS BELOW TO ASCERTAIN THE SPECIFIED WORK IN ORDER TO QUOTE APPROPRIATELY.

SITE INSPECTION MEETING

Venue: The Luthuli Museum,
3233 Nokukhanya Luthuli Street,
Groutville,
KwaDukuza
4450.

Date: 20 JUNE 2025 AT 10H00



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Complete below:

1. Delivery Address: **Luthuli Museum**
3233 Nokukhanya Luthuli Street,
Groutville, KwaDukuza, 4450
2. Indicate Delivery period after order receipt
3. Is delivery period fixed? **Yes/No**
4. Is the price(s) fixed? **Yes/No**
5. Is the quote strictly to specification? **Yes/No**

I/We, the undersigned, agree that this bidding price shall remain binding on me/us and open for acceptance for the period stipulated above.

Authorised Company Representative:

Capacity under which this quote is signed:

Signature:

Date:



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EVALUATION CRITERIA

RFQs received will be evaluated in three stages, Mandatory Requirements criteria, Functionality evaluation and Price & specific goals comparison.

STAGE:1 MANDATORY CRITERIA

- a) SARS Tax Pin
- b) BBBEE Affidavit/Certificate
- c) CIPC Registration
- d) CVs and Qualifications of Key Personnel.
- e) ID Copy/s of Company Director
- f) Traceable Reference Letters or Completion Certificates (On company letterhead)
- g) Public Liability Insurance
- h) Letter of Good Standing
- i) Methodology for the scope of work – Directed to Luthuli Museum

Note: Bidders that do not meet the set mandatory criteria will be eliminated from further evaluation process.

STAGE 2: FUNCTIONALITY EVALUATION

The Functional Criteria that will be used to test the capability of Bidders are as follows: The technical proposal will be evaluated according to the following criteria and scoring system. The technical score will be calculated out of **100 points**, and only those bids that achieve a threshold of **70 points** for the technical proposal will move to the next level of evaluation where a score for **price**.

The evaluation of the functional/technical detail of the proposal will be based on the following criteria:

Functional Factor	Criteria Description	Weight (%)
Company Profile	Bidder must submit a company profile indicating their core function, age, resources, and capability.	10
Company Experience	- Bidders must demonstrate the company's relevant experience by submitting a list of similar projects executed between 2020 and 2025. - The list of projects must be relevant to the project. - A minimum of three (3) projects must be submitted.	20
Reference Letters	- Bidder must submit reference letters or completion certificates for work / projects completed between 2020 and 2025 from previous clients. - The list of projects must be relevant to the project. - A minimum of three (3) reference letters or completion certificate must be submitted.	30
Curriculum Vitae	- Bidders must submit CVs of Key Engineers that will be deployed in the project. A minimum of five (5) years' experience in managing similar projects is required. - CV of Quantity Surveyor (QS) - CV of Electrical Engineer - CV of Mechanical Engineer - CV of Structural Engineer	40
TOTAL POINTS FOR FUNCTIONALITY		100

SCORING SHEET

No.	Criteria	Proof required	Points allocation	Weight	
1.	Company profile	Bidder must submit a company profile indicating their core function, age, resources, and capability.	No submission - 0 point 1 to 4 years of operation - 3 points 5 to 6 years of operation - 5 points 7 to 9 years of operation - 7 points > 9 years of operation - 10 points	10%	
2.	Company Experience	Bidders must submit a list of similar relevant projects executed between 2020 and 2025. The list of projects must be relevant to the project	No submission - 0 point 1-2 relevant projects submitted - 6 points 3-4 relevant projects submitted - 10 points 5-6 relevant projects submitted - 14 points >7 relevant projects submitted - 20 points	20%	
3.	Reference Letters or Completion Certificates	Bidders must submit reference letters or completion certificates for work / projects completed between 2020 to 2025 from previous clients. (Reference letters must be written by the clients where the work was done. Reference letter from other team members or professional service providers will not be accepted).	No submission - 0 point 1-2 relevant references submitted - 6 points 3-4 relevant references submitted - 10 points 5-6 relevant references submitted - 14 points >7 relevant references submitted - 20 points	20%	
4.	Curriculum Vitaes	Bidder must submit a detailed CV of the Architect to be assigned to the project. A minimum of 5 year' experience in the built environment is required.	No submission of CV - 0 point 1 to 6 years' experience - 3 points 7 to 8 years' experience - 5 points 9 to 10 years' experience - 7 points > 10 years' experience - 10 points	10%	50%
		Bidder must submit a detailed CV of the QS to be assigned to the project. A minimum of 5 year' experience in the built environment is required.	No submission of CV - 0 point 1 to 6 years' experience - 3 points 7 to 8 years' experience - 5 points 9 to 10 years' experience - 7 points > 10 years' experience - 10 points	10%	
		Bidder must submit a detailed CV of the Electrical Engineer to be assigned to the project. A minimum of 5 year' experience in the built environment is required.	No submission of CV - 0 point 1 to 6 years' experience - 3 points 7 to 8 years' experience - 5 points 9 to 10 years' experience - 7 points > 10 years' experience - 10 points	10%	
		Bidder must submit a detailed CV of the Mechanical Engineer to be assigned to the project. A minimum of 5 year' experience in the built environment is required.	No submission of CV - 0 point 1 to 6 years' experience - 3 points 7 to 8 years' experience - 5 points 9 to 10 years' experience - 7 points > 10 years' experience - 10 points	10%	
		Bidder must submit a detailed CV of the Structural Engineer to be assigned to the project. A minimum of 5 year' experience in the built environment is required.	No submission of CV - 0 point 1 to 6 years' experience - 3 points 7 to 8 years' experience - 5 points 9 to 10 years' experience - 7 points > 10 years' experience - 10 points	10%	
TOTAL				100%	



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STAGE 3: PRICE AND SPECIFIC GOALS EVALUATION

Evaluation of the quotations received is based on the 80/20 preference point system as per PFMA regulation of 2022.

Specific Goal to be evaluated out of 20 Points:

SPECIFIC GOAL CRITERIA	POINTS
Race HDP (100% Black Equity Ownership)	10
Gender HDP (Women Equity Ownership is 51% or more)	4
Youth Equity Ownership (Youth Equity Ownership is 100%)	4
People with Disability	2
TOTAL	20

***** Enterprises that are not owned by historically disadvantaged person will be allocated 0 points.**

Claim for Specific Goals for 20 Points Allocation

The 20 points will be applied as follow:

- If a Bidder is a Black company with a minimum of 100% Black Equity Ownership, 10 Points must be allocated. (If Black Equity Ownership is less than 100%, no points may be allocated)
- If HDP Women Equity Ownership is 51% or more, 4 Points must be allocated. (If Women Equity Ownership is less than 51%, no Points may be allocated).
- If Youth Equity Ownership is 100%, 4 Points must be allocated. (If Youth Equity Ownership is less than 100%, no Points may be allocated).
- If an entity has a Disabled Ownership 2 Points must be allocated. Proof must be submitted, in the form of Doctor's Notification of Disability. (If there is no Disabled Equity Ownership, no Points may be allocated).
- Points may be allocated cumulatively in respect of the above Four Groups under relevant circumstances, as set above.

Bidders must submit the following documents to claim points:

- Certified ID copies of the company's directors as per the CIPC documents. (Certified copies must not be older than 3 months)
- CIPC Documents and or shareholder Certificate
- Medical Doctor certificate, for Disability confirmation.

Failure on the part of a service provider to submit proof or documentation required in terms of this RFQ to claim points for specific goals will be interpreted to mean that preference points for specific goals are not claimed.

SBD 4

DECLARATION OF INTEREST

1. Any legal person, including persons employed by the state¹, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes an advertised competitive bid, a limited bid, a proposal or written price quotation). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where-

- the bidder is employed by the state; and/or
- the legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.

2. **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**

2.1 Full Name of bidder or his or her representative:

2.2 Identity Number:.....

2.3 Position occupied in the Company (director, trustee, shareholder², member):
.....

2.4 Registration number of company, enterprise, close corporation, partnership agreement or trust:
.....

2.5 Tax Reference Number:

2.6 VAT Registration Number:

- 2.6.1 The names of all directors / trustees / shareholders / members, their individual identity numbers, tax reference numbers and, if applicable, employee / PERSAL numbers must be indicated in paragraph 3 below.

¹"State" means –

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

²"Shareholder" means a person who owns shares in the company and is actively involved in the management of the enterprise or business and exercises control over the enterprise.



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- 2.7 Are you or any person connected with the bidder presently employed by the state? **YES / NO**
- 2.7.1 If so, furnish the following particulars:
- Name of person / director / trustee / shareholder/ member:
- Name of state institution at which you or the person connected to the bidder is employed :
- Position occupied in the state institution:
- Any other particulars:
-
-
-
- 2.7.2 If you are presently employed by the state, did you obtain the appropriate authority to undertake remunerative work outside employment in the public sector? **YES / NO**
- 2.7.2.1 If yes, did you attach proof of such authority to the bid document? **YES / NO**
- (Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the bid.
- 2.7.2.2 If no, furnish reasons for non-submission of such proof:
-
-
-
- 2.8 Did you or your spouse, or any of the company's directors / trustees / shareholders / members or their spouses conduct business with the state in the previous twelve months? **YES / NO**
- 2.8.1 If so, furnish particulars:
-
-
-
- 2.9 Do you, or any person connected with the bidder, have any relationship (family, friend, other) with a person employed by the state and who may be involved with the evaluation and or adjudication of this bid? **YES / NO**
- 2.9.1 If so, furnish particulars.
-



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.....
.....

2.10 Are you, or any person connected with the bidder,
aware of any relationship (family, friend, other) between any
other bidder and any person employed by the state who may be
involved with the evaluation and or adjudication of this bid?

YES/NO

2.10.1 If so, furnish particulars.

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

2.11 Do you or any of the directors / trustees / shareholders / members
of the company have any interest in any other related companies
whether or not they are bidding for this contract?

YES/NO

2.11.1 If so, furnish particulars:

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

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

Full Name	Identity Number	Personal Income Tax Number	State Reference	Employee Number / Persal Number



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4 DECLARATION

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

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

.....
Signature

.....
Date

.....
Position

.....
Name of bidder



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SBD 6.1

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

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

NB: BEFORE COMPLETING THIS FORM, BIDDERS 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 Bids are received.

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

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

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

The maximum points for this tender are allocated as follows:

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

1.5 Failure on the part of a Bidder 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.



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- 1.6 The organ of state reserves the right to require of a Bidder, 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

“**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;

- (a) “**price**” means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (b) “**rand value**” means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (c) “**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
- (d) “**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:

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

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:

$$80/20 \quad \text{or} \quad 90/10$$

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

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 Bidder 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 Bid Documents, stipulate in the case of—
- 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
 - 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 Bidders: The Bidder 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 (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the Bidder)
Race HDP (Black Equity Ownership) (100% Black Equity Ownership)	10	
Gender HDP (Women Equity Ownership) (Women Equity Ownership is 51% or more)	4	
Youth Equity Ownership (Youth Equity Ownership is 100%)	4	
People with Disability	2	



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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 Bidder 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:

.....

.....

.....