

REQUEST FOR QUOTATION (RFQ)

APPOINTMENT OF EXPERIENCED SERVICE PROVIDERS FOR A PERIOD OF TWELVE (12) MONTHS TO PERFORM PHYSICAL ASSET VERIFICATION, AND ASSET TAGGING OF IZIKO'S ASSETS (PPE)

Reference Number	RFQ/PPE/02/2025
Description	SERVICE PROVIDERS TO ASSIST WITH THE PHYSICAL ASSET VERIFICATION OF PPE AND PROVIDE AN ASSET TAGGING SOLUTION.
Name of the responsible unit/department	Finance and Administration
Address	Iziko South African Museum, 25 Queen Victoria Street, Cape Town, 8001
Attention	Ronell Pedro:
Compulsory briefing session and site visit	Friday 7 March 2025 at 10h00
Closing date and time for submission	Thursday 20 March 2025 at 11h00am
Method of delivery	Quotes / Proposals, and accompanying documentation, must be emailed to scm@iziko.org.za cc ndonson@iziko.org.za (SCM) 021 481 3917:
Technical enquiries	Please contact CFO, Ronell Pedro: Telephone 021 481 3825 (office hours) Email: rpedro@iziko.org.za
Name of Bidding Company	
CSD Supplier Number (MA.....Number)	
B-BBEE Status Level of Contribution	
Quoted Price (Incl Vat)	
Signature	

1. Purpose

The purpose of this request is to invite suitably qualified service providers to perform physical asset verification and asset tagging for approximately 10 000 items of Property Plant and Equipment. The service provider will be appointed for a period of twelve months, commencing with the asset verification and tagging component of the work as soon as possible to ensure audit readiness of the 2024/25 financial year.

2. Background

Iziko Museums of South Africa (Iziko) is a schedule 3A public entity and non-profit organisation, subsidised by the National Department of Sport, Arts & Culture (DSAC), bringing together 12 national museums of the Western Cape under a single governance and leadership structure. Iziko was established in terms of the Cultural Institutions Act, 1998 (Act No. 119 of 1998) and is required to comply with the Public Finance Management Act, 1999 (Act 1 of 1999) (PFMA) and its concomitant Regulations.

3. Overview

Iziko requires the services of experienced professionals to assist with the verification of its Property Plant and Equipment (PPE) across all departments and sites.

Note: The verification excludes heritage assets.

The preferred service provider will have experience and knowledge of the Public Finance Management Act (Act No. 1 of 1999) as amended and Treasury Regulations in relation to Public Entities and should have practical experience in the application of the Standards of Generally Recognised Accounting Practice (GRAP Standards) as well as a strategy for the verification of PPE.

The service provider will utilise their experience and knowledge to assist Iziko with the verification of assets. The service provider will also make available the resources required to complete the work as soon as possible

Iziko has an approximate total of 10000 assets, located across 12 sites, most of which are in and around the City Bowl area, on its asset register.

The service provider should take into consideration the location of the assets at the various sites.

4. Scope of Work

The scope of work entails verification and tagging of assets from the responsibility lists of Iziko staff members, ensuring that the assets exist, and are recorded in their correct staff member. Assets no longer in use must be listed in a register for approval to have them written off by the Iziko Council. In addition, the service provider is expected to inspect assets in various common areas and storage locations to ensure that these assets have been assigned to a staff member tasked with taking responsibility of the assets. Any assets in these locations must be also added to the asset write-off register, where applicable.

The work also entails an advisory element in that the service provider would be expected to provide advice and training where required to ensure that the asset registers conform to the requirements of GRAP 17 and GRAP 31. In addition, the work entails providing advice on an asset disposal strategy that conforms to National Treasury norms and standards.

Finally, Iziko also requires the service provider to research and provide proposals with options for a cost-effective asset tagging solution in future that is both innovative and fit for purpose. which will be considered for implementation after completion of the verification process above. The solution must be compatible with Norming asset Management, which is the asset management system currently integrated with SAGE 300 and in use at Iziko.

The service required includes the following elements:

- 4.1 Physical verification and tagging (or re-tagging) of assets allocated to staff members as listed on their responsibility lists
- 4.2 Using the responsibility lists to indicate any asset movement, disposals or corrections, to enable adjustments to be made in the Norming Asset Management system from which the Fixed Asset registers is derived
- 4.3 Identification of Iziko assets not in the Fixed asset Register
- 4.4 Review of Fixed asset registers and advising on accuracy and the achievement of consistency of treatment of assets and inventory items
- 4.5 Impairment testing
- 4.6 Compilation of inventory lists where required
- 4.7 Compilation of asset write-off register.
- 4.8 A useful life review
- 4.9 Assist with adjustments in the Norming Asset Management system
- 4.10 Provision of consulting services including the review and revision of the Asset Management procedures in line with applicable GRAP standards and best practice, advice with the treatment of anomalies that have arisen over time; assistance with a strategy for the physical disposal of assets and any other advisory service related to asset management
- 4.11 Produce a proposal for a suitable labelling and barcoding solution to replace existing sticker labels
- 4.12 Staff Training and skills transfer

5. Service Provider Requirements and Competencies

The service provider is expected to have the following competencies at a minimum:

- 5.1 Knowledge of GRAP 17 and 31, as well as knowledge of National Treasury regulations as they relate to property, plant and equipment
- 5.2 Proven experience and knowledge of Asset, Inventory and Consumables Management
- 5.3 Adequate capacity to execute the work simultaneously across all Iziko sites
- 5.4 Adequate capacity to complete the verification and tagging of assets within a period of 3 months (90 days) or sooner, as agreed upon by both parties.

6. Compulsory Briefing Session

A compulsory briefing session and site visit will be held on 7 March 2025 at 10H00 at the TH Barry Lecture Hall, South African Museum, 25 Queen Victoria Street, Cape Town. The briefing session will be followed by a walk about to three of Iziko's bigger sites viz. the South African Museum, the South African National Gallery and the Slave Lodge, where the bulk of Iziko's assets are located. Bids where bidders did not attend the briefing will not be considered.

7. Consortiums/Joint ventures

Service Providers may assume any number of forms including (but not restricted to) a consortium/joint venture that draws on multiple disciplines, practices and experiences.

Each party to a consortium/joint venture must comply with the requirements of this request to quote.

It is also strongly recommended that in selecting their partners, consortia consider “smaller” but capable organisations which, while strengthening the proposal, will also receive some developmental benefit from partnering with larger organisations. In the event the selected proposal is a consortium/joint venture, the contract will be signed with the lead organisation, which must be identified in the proposal.

8. Duration

The successful bidder will be expected to be available for commencing the project from the date of signing of the agreement by the last party. The appointed service provider will enter into contractual agreement with Iziko for a period of 12 months.

9. Risk Assessment and Due Diligence

To ensure a comprehensive evaluation of all potential risks arising from the appointment of any bidder, Iziko may seek external assistance to provide assurance that the appropriate bid is selected. Iziko also reserves the right to conduct a thorough due diligence review on any relevant aspects of a bidder's proposal to confirm compliance with all required standards and mitigate any potential risks.

10. Bidding Stages

The Service Provider must comply with Iziko's Supply Chain Management policies and procedures by submitting the required documents.

The bidding requirements and stages are summarised in the table below:

Table 1: Bidding requirements and stages

Stage 1- Administrative Documents	Stage 2 - Functionality Criteria	Stage 3 - Price and Specific Goals
Bidders must submit all documents as outlined in Table 2: Administrative Documents . Note: Failure to supply any of the administrative documents stipulated below <u>may lead to disqualification</u> Bidders will be given three (3) working days and one opportunity in which to submit any missing or incomplete administrative documents	Bidders are required to achieve a minimum of 70% on functionality criteria to proceed to the next stage Refer Table 3 – Required documents to enable functionality scoring. Note: Failure to supply any of the administrative documents stipulated below <u>may lead to disqualification</u> Bidders will be given three (3) working days and one opportunity in which to submit any missing or incomplete documents	Bidders that meet the minimum threshold for functionality will be evaluated based on Price & Preferential Procurement Specific Goals Evaluation Criteria as indicated in Table 4 : Price – 80 points Specific Goals– 20 points

Table 2: Administrative Returnable Documents

If any of the required documents are not included in the bid, bidders will be requested in writing to submit the documents within three (3) working days and failure to do so by the third working day, will result in the relevant bid to be rejected.

Order	Documents required
1.	Central Supplier Database Report – with supplier number and company details (www.csd.gov.za) and Tax Status Verification Pin together with tax registration number
2.	Completed SBD 1 - Invitation to Bid
3.	Completed SBD 3.3 - Pricing Schedule Detailed pricing structure: A cost schedule detailing full cost breakdown, inclusive of VAT, any disbursement and escalations, if applicable, etc. for the entire duration of the proposed contract must be provided
4.	Completed SBD 4 – Bidder's Disclosure
5.	Completed SBD 6.1 - Preference Points Claim Form (Preferential Procurement Regulations 2022)

Table 3: Documentation for Functionality Scoring

If any of the required documents are not included in the bid, bidders will be requested in writing to submit the documents within three (3) working days and failure to do so by the third working day, will result in the relevant bid to be rejected.

No.	In order to score the bid for functionality, the proposal should include the following:
1	Reference (s) letters not older than 5 years from previous clients demonstrating years of experience in executing projects of a similar nature.
2	The CV(s) and qualifications of the project manager (s) indicating number of years' experience with similar projects
3	Execution plan covering specific points listed below
4	A project team organogram with a resource allocation plan

Preference Points Claim

In terms of Regulation 4 of the Preferential Regulations pertaining to the Preferential Procurement Policy Framework Act 2000 (Act 5 of 2000) Preferential Procurement Regulations, 2022 responsive bids will be adjudicated by the state on the 80/20 preference point for Specific goals in terms of which points are awarded to the bidders on the basis of price and specific goals, as follows:

Table 5: Price and Specific Goals

Preference Point Criteria	Points Allocation
Price	80

Specific Goals A Valid B-BBEE certificate or Sworn Affidavit; Company Registration Certification Identification Documentation of shareholders. Latest CSD report Ownership by HDIs (Who had no franchise on national elections before the 1983 and 1993 constitution) 50% or more black ownership = 20 points Less than 50% black ownership = 10 points 0% black ownership = 0 points	20
TOTAL POINTS	100

3. Functionality

Proposals must score an overall minimum of 70% (70 points) for functionality criteria to qualify for further evaluation for preference points.

Functionality Criteria		Points Allocation	Value
1.	Experience in Similar Projects	25	
2.	Knowledge and qualifications of key team members	25	
3.	Technical Approach and Execution Plan	25	
4.	Capacity	25	
Sub Total		100	
Minimum Stipulated Threshold to be met		70 points (70%)	

DETAILED FUNCTIONALITY EVALUATION CRITERIA

NO.	CRITERION	DESCRIPTION		SCORE					
1.	Service Provider Experience in similar projects Provide supporting reference letter(s) not older than 5 years from previous clients demonstrating years of experience in executing projects of a similar nature.	Reference (s) letters for work performed in the past 5 years. The reference letters: 1. must be signed by the referee and 2. contain the value; exact nature of work performed, as well as the duration of the project, preferably in tabular form as follows: <table><tr><td>Client Name</td><td>Period</td><td>Value</td><td>Project Description</td></tr></table>		Client Name	Period	Value	Project Description		
Client Name	Period	Value	Project Description						

		Iziko reserves the right to verify the validity of the references.		
		No references letters/unsigned reference letters/reference letters do not contain details of projects, values and duration as stated above	0	
		3 reference letters for similar work done within the past 5 years	10	
		4 reference letters for similar work done within the past 5 years	15	
		5 or more reference letters for similar work done within the past 5 years (Max 25)	25	
2.	Knowledge and qualifications of key team members Submit the; CVs and qualifications of key members of the project team to indicate desired level of experience and knowledge of accounting and specifically asset management to successfully complete a project of this nature. .	Provide: 1. The CV at least one key member indicating their experience in similar projects 2. Qualifications of key team member(s) listed above (Max 25)		
		CV('s) of key team member(s) not provided and/or the CV('s) indicate less than one year's experience and/or Qualifications of listed key team member(s) not provided or not relevant	0	
		The CV('s) of key team member(s) indicate 1 to 2 years' experience in similar projects and key team member(s) have the required qualifications	10	
		The CV('s) of key team member (s) indicate 3 to 5 years' experience in similar projects and key team member(s) have a relevant qualification	15	
		The CV('s) of key team member(s) indicate more than 5 years' experience in similar projects and key team members(s) have the required qualifications	25	

3	Technical Approach and Execution Plan Provide a comprehensive methodology which demonstrates an understanding of the project requirements, timelines, and deliverables, and establishes clear communication lines with Iziko.	Comprehensive Execution plan to cover at least the following points: Summary: A concise summary of how the bidder plans to conduct the asset verification and tagging process. Timelines: A timeline that includes key milestone Personnel: The number of personnel to be deployed and their availability. Quality Control: An indication of which quality control checks will be done to ensure accuracy and completeness Communication: A clear indication of how issues and updates will be handled throughout the project, including designated points of contact, and reporting frequency Post-implementation support: An indication of post-implementation support that will be given		
		(Max 25)		
		No Execution plan is provided, or the plan is generic, unclear and vague	0	
		4 or fewer of the above points are covered adequately	10	
		4 - 5 of the above points are covered adequately	15	
		All 6 of the above points covered with a detailed and comprehensive approach covering all key aspects	25	
4.	Capacity Ability to allocate sufficient resources and maintain capacity throughout the project to meet deadlines	The service provider should have the ability to allocate sufficient resources and maintain capacity throughout the project to meet deadlines, since asset verification and tagging can be resource intensive.		

		A project team organogram with a resource allocation plan that demonstrates how resources will be distributed across the project to ensure completion within the stipulated timeline. (Max 25)		
		No organogram and/or organogram is generic and not project specific and/or no Capacity Plan and/or the plan does not reflect sufficient capacity to complete the verification and tagging within 90 days	0	
		Organogram is not clear on roles and the Resource Allocation and Staffing Plan is basic but does reflect sufficient capacity to complete the verification and tagging within 90 days	10	
		Project specific organogram provided, and the Capacity and Resource Plan is comprehensive with adequate staff allocation. Plan includes details on equipment and tools that will be used to complete the verification and tagging within 90 days	25	
Total Points			100	
Minimum Stipulated Threshold to be met			70 points (70%)	

Note: Only proposals meeting the Minimum Stipulated Threshold of 70% of the Functionality Evaluation will be considered for further evaluation for 80/20 Preference Points

4. Price

Price is an important factor as it ensures optimum value for money and Total Cost to Iziko and should take into account the full duration of the contracting period.

Please complete SBD 3.3 below. A cost schedule detailing hourly rates, inclusive of VAT, any disbursements and escalations, if applicable, etc. for the entire duration of the proposed contract may also be provided.

5. Validity Period

Offer to be valid for 180 working days from the bid closing date.

6. Formal Contract

- The proposal and appended documentation read together form the basis for an agreement to be negotiated and concluded in a formal contract between Iziko and the preferred Service Provider.
- A mere offer and acceptance shall not constitute a formal contract of any nature for any purpose between Iziko and the preferred Service Provider.

7. Reasons for disqualification

Iziko reserves the right to disqualify any submission in the event of any one or more of the following:

- The Bidder did not attend the compulsory briefing session and site visit
- The Bidder submitted their proposal late;
- The Bidder did not submit proof of CSD registration
- The Bidder did not meet the eligibility criteria
- The Bidder did not submit complete documentation or fails to provide the documentation /information within the requested timeframes
- The Bidder submits information that is fraudulent, factually untrue or inaccurate;
- The Bid did not meet the required minimum stipulated threshold points.

8. SUMMARY OF GENERAL PRINCIPLES

- Iziko will apply the 80/20 preferential points system.
- Iziko applies the provisions of the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000) and the Public Finance Management Act, 1999 (Act No. 1 of 1999).
- The lowest or only proposal received will not necessarily be accepted.
- Iziko reserves the right to withdraw its decision to seek the provision of these services at any time.
- Iziko reserves the right to appoint consultants to assist with technical and risk assessments of bids.
- Iziko reserves the right to obtain clarification from a bidder on any matter that could give rise to ambiguity in a contract arising from the bid proposal
- Iziko reserves the right to request and accept changes to a proposal from a successful bidder at any time, as long as it complies with legal and administrative requirements
- Iziko reserves the right to request the administrative returnable documents after the closing date and time in instances where the Bidder has not returned the documents. However, Iziko is under no obligation to request such documents or information and may elect to disqualify the Bidder that has not returned the requisite document.
- There will be no discussions with any bidder until a final decision has been taken by the Bid Adjudication Committee. Any subsequent discussions shall be at the discretion of Iziko.

9. Delivery Approach

The successful applicant shall, on signing the agreement, commence with business on a date agreed to by both parties.

The contract is for a one (1) year period as from the date of commencement.

10. Submission of Bids

Closing date and time: Thursday 20 March 2025 at 11h00am

Facsimiles, and late bids will not be accepted.

11. Submissions

Interested Bidders are expected to submit returnable documents on the original Request to Quote document issued by Iziko and completed in black ink.

It is the responsibility of each bidder when submitting to ensure that they complete the Briefing session attendance Register.

The submission should be in the form of an electronic version of all documentation in the proposal.

It is important to note that all bids lodged will be examined to determine compliance with the bidding requirements and conditions. Bids with obvious deviation from the requirements, will be eliminated.

WRITTEN OR TELEPHONIC QUERIES MUST BE DIRECTED TO:

Ronell Pedro

Chief Financial Officer

Iziko Museums of South Africa

Switchboard: +27 21 481 3800

Direct Line; +27 21 468 3807

E-Mail: rpedro@iziko.org.za



Signature: _____

Ms. Ronell Pedro

Chief Financial Officer

ANNEXURE A: PRICING SCHEDULE

A detailed and Comprehensive Pricing Schedule must be submitted, using the table below as a guideline

1. Clearly indicate rates for each type of service, specifying the applicable unit
2. The number of hours required will be determined by the volume of work. For the purposes of comparison bidders will be scored at an estimated total of 1000 hours for asset tagging and 300 hours for other services/work.
3. The pricing structure must be inclusive of VAT
4. Any disbursements and escalations must be indicated separately.

Designation/Description of Service	Rate per Hour	Total Hours (estimate 1000 and 300 hours to completion.)	Total Cost (R)
1. 1. Asset Verification and tagging			
2. Review of Fixed asset registers and advising on accuracy and the achievement of consistency of treatment of assets and inventory items			
3. Impairment testing			
4. Compilation of inventory lists where required			
5. Compilation of asset write-off register.			
6. A useful life review			
7. Assist with adjustments in the Norming Asset Management system			
8. Provision of consulting services including the review and revision of the Asset Management procedures in line with applicable GRAP standards and best practice, advice with the treatment of anomalies that have arisen over time; assistance with a strategy for the physical disposal of assets and any other advisory service related to asset management			
9. Produce a proposal for a suitable labelling and barcoding solution to replace existing sticker labels			
10. Staff Training and skills transfer			
OTHER FEES -SPECIFY			
OTHER EXPENDITURE - SPECIFY			
TOTAL			
VAT			
TOTAL INCL VAT			

ADMINISTRATIVE DOCUMENTS

PART A

INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)

BID NUMBER:		CLOSING DATE:		CLOSING TIME:	
-------------	--	---------------	--	---------------	--

DESCRIPTION

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

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO

TECHNICAL ENQUIRIES MAY BE DIRECTED TO:

CONTACT PERSON		CONTACT PERSON	
TELEPHONE NUMBER		TELEPHONE NUMBER	
FACSIMILE NUMBER		FACSIMILE NUMBER	
E-MAIL ADDRESS		E-MAIL ADDRESS	

SUPPLIER INFORMATION

NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA

ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	☐Yes ☐No [IF YES ENCLOSE PROOF]	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?	☐Yes ☐No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
---	---	--	---

QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS

IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? ☐

YES ☐ NO

DOES THE ENTITY HAVE A BRANCH IN THE RSA? ☐

YES ☐ NO

DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA? ☐

YES ☐ NO

DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA? ☐

YES ☐ NO

IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? ☐

YES ☐ NO

IF THE ANSWER IS “NO” TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.

PART B
TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:

- 1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
- 1.2. **ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED (NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.**
- 1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
- 1.4. **THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).**

2. TAX COMPLIANCE REQUIREMENTS

- 2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
- 2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
- 2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
- 2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
- 2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
- 2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
- 2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

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

SIGNATURE OF BIDDER:

CAPACITY UNDER WHICH THIS BID IS SIGNED:

(Proof of authority must be submitted e.g. company resolution)

DATE:

PRICING SCHEDULE
(Professional Services)

NAME OF BIDDER:BID NO.:

CLOSING TIME 11:00

CLOSING

DATE.....

OFFER TO BE VALID FORDAYS FROM THE CLOSING DATE OF BID.

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

1. The accompanying information must be used for the formulation of proposals.
2. Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project.
3. Bidders are required to complete the pricing/ costing schedule in **Annexure B**.
4. PERSONS WHO WILL BE INVOLVED IN THE PROJECT AND RATES APPLICABLE (CERTIFIED INVOICES MUST BE RENDERED IN TERMS HEREOF)

PERSON AND POSITION	HOURLY RATE	DAILY RATE

5. PHASES ACCORDING TO WHICH THE PROJECT WILL BE COMPLETED, COST PER PHASE AND MAN-DAYS TO BE SPENT

----- R----- days

----- R----- days

----- R----- days

----- R----- days

----- R----- days

----- R----- days

6.1 Travel expenses (specify, for example rate/km and total km, class of air travel, etc). Only actual costs are recoverable. Proof of the expenses incurred must accompany certified invoices.

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT
	R		R
	R		R
	R		R
	R		R
	R		R
	R		R
TOTAL	R		R

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

6.2 Other expenses, for example accommodation (specify, e.g. Three-star hotel, bed and breakfast, telephone cost, reproduction cost, etc.). On basis of these particulars, certified invoices will be checked for correctness. Proof of the expenses must accompany invoices.

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT
	R		R
	R		R
	R		R
	R		R
TOTAL	R		R

Period required for commencement with project after acceptance of bid

.....
6. Estimated man-days for completion of project

.....
7. Are the rates quoted firm for the full period of contract? *YES/NO

8. If not firm for the full period, provide details of the basis on which adjustments will be applied for,
for example consumer price index.

.....
*

[DELETE IF NOT APPLICABLE]

Any enquiries regarding bidding procedures may be directed to the –

(INSERT NAME AND ADDRESS OF DEPARTMENT/ENTITY)

Iziko Museums of South Africa

25 Queen Victoria Street, Cape Town, 8000

Siphamandla Oupa (SCM) 021 481 3889 or Noleen Donson 021 4813814

soupa@iziko.org.za & ndonson@iziko.org.za

Or for technical information –

Ronell Pedro

rpedro@iziko.org.za

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

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

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

2. Bidder's declaration

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

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

Full Name	Identity Number	Name of State institution

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.

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

2.2.1 If so, furnish particulars:

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

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

2.3.1 If so, furnish particulars:

.....
.....

3 DECLARATION

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

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

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

(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 (Company Name)

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**

The applicable preference point system for this tender is the 80/20 preference point system.

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

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

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

The maximum points for this tender are allocated as follows:

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

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

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

2. DEFINITIONS

(a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation

to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;

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

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

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

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

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

Where

P_s = Points scored for price of tender under consideration
 P_t = Price of tender under consideration
 P_{min} = 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	
$P_s = 80 \left(1 + \frac{P_t - P_{max}}{P_{max}} \right)$	or	$P_s = 90 \left(1 + \frac{P_t - P_{max}}{P_{max}} \right)$	

Where

P_s = Points scored for price of tender under consideration
 P_t = Price of tender under consideration
 P_{max} = 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	Evidence	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Persons, or categories of persons, historically disadvantaged- (HDI) by unfair discrimination on the basis of race	• Proof of B-BBEE certificate and/or; • Company Registration Certification and/or • Copies of Shareholders IDs		
Race: Black persons (ownership)* 50% or more black ownership = 20 points Less than 50% black ownership = 10 points 0% black ownership = 0 points			

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:

.....

.....

.....

