



PIKITUP JOHANNESBURG SOC LIMITED

BID DOCUMENT FOR THE APPOINTMENT OF A PANEL OF A MAXIMUM 30 MULTI-DISCIPLINARY CONSULTANTS TO SUPPORT PIKITUP (SOC) LTD ON VARIOUS PROJECTS ON AN AS AND WHEN REQUIRED BASIS FOR THE PERIOD OF 36 MONTHS FROM THE DATE OF APPOINTMENT

BID NO: PU 143 / 2024

CLOSING DATE: 20 JANUARY 2025

CLOSING TIME: 11:00AM

BIDDER NAME:

PROFESSIONAL DISCIPLINE	CATEGORY
Bidders must indicate the applicable category or categories they respond to by marking next to the relevant category/ies with an "X". Bidders may respond to one or more categories.	(Mark with X below)
CATEGORY A - PROJECT MANAGEMENT CONSORTIUM (Minor PPP)	
CATEGORY B - PROJECT MANAGEMENT CONSORTIUM (Major PPP)	
CATEGORY C - ENGINEERING SERVICES (Infrastructure projects)	
CATEGORY D - SPECIALIST STUDIES	
CATEGORY E - LAND SURVEYOR	
CATEGORY F - TOWN PLANNING SERVICES	

TENDER DOCUMENT FOR:
PIKITUP JOHANNESBURG SOC LTD
JORISSEN PLACE
66 JORISSEN STREET
BRAAMFONTEIN, JHB

Contact person: Morne Koortzen
E-mail: mornekoortzen@pikitung.co.za
Enquiries relating to this bid may be e-mailed to the mentioned above contact person.

Bid document must be deposited at:
Pikitung Head Office, Tender Office, Ground Floor, East Wing, Jorissen Place, 66 Jorissen Street, Braamfontein, JHB before the closing date and time.

Compulsory Briefing Session will be held:
DATE: WEDNESDAY, 11 DECEMBER 2024;
TIME: 11:00AM TO 12:00
VENUE: PIKITUP WATERVAL DEPOT HALL,
PHYSICAL ADDRESS: NO 3 ALBERT STREET, ALBERTVILLE,
GAUTENG. GPS COORDINATES: LONGITUDE 27.978244,
LATITUDE -26.168947

BID REFERENCE NUMBER PU143/2024 FOR THE APPOINTMENT OF A PANEL OF A MAXIMUM 30 MULTI-DISCIPLINARY CONSULTANTS TO SUPPORT PIKITUP (SOC) LTD ON VARIOUS PROJECTS ON AN AS AND WHEN REQUIRED BASIS FOR THE PERIOD OF 36 MONTHS FROM THE DATE OF APPOINTMENT

SCAM ALERT

With an endeavor to promote transparent tender processes and to comply with the relevant legislation, bidding company names and bid values are called out at tender opening and such details are also published on the Pikitup website. Fraudsters however abuse the information available from various sources on the internet with fraudulent intentions.

It came to our attention that fraudsters are posing as municipal employees claiming that they are members of either the Bid Evaluation or Adjudication Committee, and soliciting bribes from bidders for being favored during the tender evaluation or being awarded the tender.

Bidders are requested to be vigilant pertaining to the following:

- Pikitup tender documents are available free of charge from the National Treasury e-tender portal, thus do not pay for tender documents.
- Pikitup is using the National Treasury Central Supplier Database (CSD), hence Pikitup will not request bidders to pay for supplier registration forms.
- All Pikitup tenders are published on the National Treasury e-tender portal and / or the Pikitup website. Only respond to tenders that are published on these websites.
- Bid responses must be deposited in the Pikitup tender box as indicated in the respective tender documents.
- Only correspond in writing with the Pikitup contact person as indicated in the tender document. The Pikitup official and contact details are also specified in the invitation to tender as advertised on the National Treasury e-tender portal and / or Pikitup website.
- Do not entertain any request for a bribe, and never pay money for being favored or being awarded a tender.

REPORT FRAUD AND CORRUPTION

Please report fraud and corruption at the City of Johannesburg Anti-Fraud Hotline: 0800 002 587 or the National Treasury Anti-Corruption Hotline: 0800 701 701

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ANNEXURE 1.1

MBD 1

INVITATION TO BID

PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF MUNICIPALITY/ MUNICIPAL ENTITY)					
BID NUMBER:	PU143/2024	CLOSING DATE:	20 JANUARY 2025	CLOSING TIME:	11:00 AM
DESCRIPTION	THE APPOINTMENT OF A PANEL OF A MAXIMUM 30 MULTI-DISCIPLINARY CONSULTANTS TO SUPPORT PIKITUP (SOC) LTD ON VARIOUS PROJECTS ON AN AS AND WHEN REQUIRED BASIS FOR THE PERIOD OF 36 MONTHS FROM THE DATE OF APPOINTMENT				
THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (MBD7).					
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT:					
PIKITUP TENDER BOX, SITUATED AT PIKITUP JOHANNESBURG (SOC) LIMITED, JORISSEN PLACE, TENDER OFFICE, EAST WING, GROUND FLOOR, 66 JORISSEN STREET, BRAAMFONTEIN, JOHANNESBURG, 2000					
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					
TAX COMPLIANCE STATUS	TCS PIN:		OR	CSD No:	
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	☐ Yes ☐ No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?		☐ Yes ☐ No [IF YES, ANSWER PART B:3]
TOTAL NUMBER OF CATEGORIES RESPONDED TO			TOTAL BID PRICE		Not applicable
SIGNATURE OF BIDDER			DATE		
CAPACITY UNDER WHICH THIS BID IS SIGNED					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO:			TECHNICAL INFORMATION MAY BE DIRECTED TO:		
DEPARTMENT	SUPPLY CHAIN UNIT		CONTACT PERSON	SAME	
CONTACT PERSON	MORNE KOORTZEN		TELEPHONE NUMBER	SAME	
TELEPHONE NUMBER	087 357 1196		FACSIMILE NUMBER	SAME	
E-MAIL ADDRESS	mornekoortzen@pikitup.co.za		E-MAIL ADDRESS	SAME	

BID REFERENCE NUMBER PU143/2024 FOR THE APPOINTMENT OF A PANEL OF A MAXIMUM 30 MULTI-DISCIPLINARY CONSULTANTS TO SUPPORT PIKITUP (SOC) LTD ON VARIOUS PROJECTS ON AN AS AND WHEN REQUIRED BASIS FOR THE PERIOD OF 36 MONTHS FROM THE DATE OF APPOINTMENT

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) 1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, THE PREFERENTIAL PROCUREMENT REGULATIONS OF 2022, THE PIKITUP SCM POLICY AND PROCEDURE, THE TENDER CONDITIONS, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.										
2. TAX COMPLIANCE REQUIREMENTS										
2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS. 2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VIEW THE TAXPAYER'S PROFILE AND TAX STATUS. 2.3 APPLICATION FOR THE TAX COMPLIANCE STATUS (TCS) CERTIFICATE OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE WWW.SARS.GOV.ZA. 2.4 FOREIGN SUPPLIERS MUST COMPLETE THE PRE-AWARD QUESTIONNAIRE IN PART B:3. 2.5 BIDDERS MAY ALSO SUBMIT A PRINTED TCC CERTIFICATE TOGETHER WITH THE BID. 2.6 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCC CERTIFICATE / PIN / CSD NUMBER. 2.7 WHERE NO TCC IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED, THAT WILL BE USED TO VERIFY THE CURRENT TAX COMPLIANCE STATUS.										
3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS (THIS SECTION B3 IS ONLY APPLICABLE FOR FOREIGN BASED SUPPLIER FOR THE GOODS / SERVICES / WORKS)										
<table style="width: 100%; border: none;"> <tr> <td style="width: 80%;">3.1. IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?</td> <td style="width: 20%; text-align: right;">☐ YES ☐ NO</td> </tr> <tr> <td>3.2. DOES THE ENTITY HAVE A BRANCH IN THE RSA?</td> <td style="text-align: right;">☐ YES ☐ NO</td> </tr> <tr> <td>3.3. DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?</td> <td style="text-align: right;">☐ YES ☐ NO</td> </tr> <tr> <td>3.4. DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?</td> <td style="text-align: right;">☐ YES ☐ NO</td> </tr> <tr> <td>3.5. IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?</td> <td style="text-align: right;">☐ YES ☐ NO</td> </tr> </table> 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 ABOVE.	3.1. IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?	☐ YES ☐ NO	3.2. DOES THE ENTITY HAVE A BRANCH IN THE RSA?	☐ YES ☐ NO	3.3. DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?	☐ YES ☐ NO	3.4. DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?	☐ YES ☐ NO	3.5. IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?	☐ YES ☐ NO
3.1. IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?	☐ YES ☐ NO									
3.2. DOES THE ENTITY HAVE A BRANCH IN THE RSA?	☐ YES ☐ NO									
3.3. DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?	☐ YES ☐ NO									
3.4. DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?	☐ YES ☐ NO									
3.5. IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?	☐ YES ☐ NO									

NB:

- FAILURE TO PROVIDE ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.
- NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE.

SIGNATURE OF BIDDER:

CAPACITY UNDER WHICH THIS BID IS SIGNED:

DATE:

ANNEXURE 1.2

AUTHORITY TO SIGN A BID

The bidder must provide a resolution confirming that the person or official signing the tender documents is authorised to sign on behalf of the bidding organisation, or the bidding organisation may complete one of the following relevant templates for this purpose.

1. <u>Sole Proprietor (Single Owner Business) and Natural Person</u>			
1.1 I, , the undersigned, hereby confirm that I am the sole owner of the business trading as			
OR			
1.2 I, , the undersigned, hereby confirm that I am submitting this tender in my capacity as natural person.			
SIGNATURE		DATE	
PRINT NAME			
WITNESS 1		WITNESS 2	

2. <u>Companies and Close Corporations</u>			
2.1 If a Bidder is a Company, a certified copy of the resolution by the board of directors, duly signed, authorising the person who signs this bid to do so, as well as to sign any contract resulting from this bid and any other documents and correspondence in connection with this bid and/or contract on behalf of the company must be submitted with this bid, that is, before the closing time and date of the bid.			
2.2 In the case of a Close Corporation (CC) submitting a bid, a resolution by its members authorising a member or other official of the corporation to sign the documents on their behalf, shall be included with the bid.			
Date Resolution was taken			
Resolution signed by (name and surname)			
Capacity			
Name and surname of delegated Authorised Signatory			
Capacity			
Specimen Signature			
Full name and surname of all Director(s) / Member (s)			
1.		2.	
3.		4.	
5.		6.	
7.		8.	
9.		10.	
Is a certified copy of the resolution attached?			YES NO
SIGNED ON BEHALF OF COMPANY / CC		DATE	
PRINT NAME			
WITNESS 1		WITNESS 2	

3.
Partnership

We the undersigned partners in the business trading as
hereby authorise Mr/Mrs to sign
this bid as well as any contract resulting from the bid and any other documents and correspondence in
connection with this bid and/or contract for and on behalf of the above-mentioned partnership.
The following particulars in respect of every partner must be furnished and signed by every partner:

Full name of partner		Signature	
SIGNED ON BEHALF OF PARTNERSHIP		DATE	
PRINT NAME			
WITNESS 1		WITNESS 2	

4. Consortium

We the undersigned consortium partners, hereby authorise (Name of entity) to act as lead consortium partner and further authorise Mr/Ms to sign this offer as well as any contract resulting from this tender and any other documents and correspondence in connection with this tender and / or contract for and on behalf of the consortium.

The following particulars in respect of each consortium member must be provided and signed by each member.

Full name of Consortium Member	Role of Consortium Member	% Participation	Signature
SIGNED ON BEHALF OF CONSORTIUM		DATE	
PRINT NAME			
WITNESS 1		WITNESS 2	

5. JOINT VENTURE

We, the undersigned, are submitting this bid offer in joint venture and hereby authorize Mr / Ms

.....

Authorized signatory of the Company / Close Corporation / Partnership (name)

.....

Acting in the capacity of lead partner, to sign all documents in connection with the bid offer and any contract resulting from it on our behalf.

LEAD PARTNER (Whom the Pikitup shall hold liable for the purpose of the tender)			
NAME OF FIRM			
ADDRESS			
		TEL. NO.	
SIGNATURE		DESIGNATION	

2 nd PARTNER			
NAME OF FIRM			
ADDRESS			
		TEL. NO.	
SIGNATURE		DESIGNATION	

3 rd PARTNER			
NAME OF FIRM			
ADDRESS:			
		TEL. NO.	
SIGNATURE		DESIGNATION	

4 th PARTNER			
NAME OF FIRM			
ADDRESS:			
		TEL. NO.	
SIGNATURE		DESIGNATION	

NOTE: A copy of the Joint Venture Agreement indicating clearly the percentage contribution of each partner to the Joint Venture, is to be submitted with the bid.

A board resolution, authorising each signatory who signed above to do so, is to be submitted with the bid.

ANNEXURE 1.3

CERTIFICATE FOR PAYMENT OF MUNICIPAL SERVICES (OR OTHER SERVICE PROVIDER)

CERTIFICATE FOR PAYMENT OF MUNICIPAL SERVICES (OR OTHER SERVICE PROVIDER)

DECLARATION IN TERMS OF MUNICIPAL SCM REGULATIONS 21(d) (ii)

I, (full name) and (ID no.), hereby acknowledge that the Pikitup may reject the tender of the tenderer if any municipal rates and taxes or municipal service charges owed by the bidder or any of its directors/members/partners to the City of Johannesburg, or to any other municipality or municipal entity, are in arrears for more than 3 (three) months.

I declare that I am duly authorised to act on behalf of (name of the firm) and hereby declare, that to the best of my personal knowledge, neither the firm nor any director/member/partner of said firm is in arrears on any of its municipal accounts with any municipality in the Republic of South Africa, for a period longer than 3 (three) months.

I further hereby certify that the information set out in this schedule and/or attachment(s) hereto is true and correct. The bidder acknowledges that failure to properly and truthfully complete this schedule may result in the tender being disqualified, and/or in the event that the tenderer is successful, the cancellation of the contract.

PHYSICAL BUSINESS ADDRESS(ES) OF THE TENDERER	MUNICIPAL ACCOUNT NUMBER

Further details of the bidder's director(s) / shareholder(s) / partner(s) / member(s), etc.:

Director / partner / member	Physical residential address of the director / partner / member	Municipal account number(s)

PLEASE NOTE:

1. Copies of municipal account statements for the bidding organisation and all directors / shareholders / partners / members, etc. to be submitted with the bid. The municipal account statement must not be older than 3 months from date of tender closing and must not be in arrears for more than 90 days.
2. If the bidding entity or any of its directors/shareholders/partners/members, etc. is not the owner of the property but rents, leases or occupy the property, written confirmation is required from the landlord or the landlord's property agent confirming that the resident's account is not in arrears for more than 90 days and / or that the resident's account is in good standing. The landlord or the landlord's property agent correspondence must not be older than 3 months from date of tender closing.

Signature	Position	Date

ANNEXURE 1.4

CONDITIONS OF TENDER

CONDITIONS OF TENDER

1. GENERAL

- 1.1. Pikitup Supply Chain Management Policy and Procedure Manual (latest) will apply.
- 1.2. All bids must be submitted in **handwriting and in non-erasable black or blue ink** on the official forms supplied by the municipality.
- 1.3. Under no circumstances, whatsoever may the bid forms be retyped or redrafted.
- 1.4. No alterations / corrections to the information in the document (including pricing) may be performed by pasting another page over it with glue.
- 1.5. The use of correction fluid or correction tape is prohibited.
- 1.6. Alterations and/or corrections may only be affected as follows:
 - 1.6.1. By striking a straight line in black or blue ink through the incorrect information in such a manner that the information that has been struck through remains legible; writing, the altered or corrected information as appropriate (under, above or next to the information to be corrected), and initialling in the margin next to each and every alteration or correction.
 - 1.6.2. All corrections/alterations to the Pricing Schedule / Bill of Quantities (BoQ) and / or any pricing not effected in accordance with the aforementioned, will be rejected.
- 1.7. Wherever the tender document refers to any particular trademark, name patent, design, type, specific origin, or producer, such reference shall be deemed to be accompanied by the words "or equivalent".

2. PRICING

- 2.1. Rates and prices offered by the bidder must be written onto the pricing schedule or form of offer of this document by hand, completed in full and originally signed by the duly authorised signatory.
- 2.2. All prices shall be quoted in South African currency, and must be inclusive of all related costs, taxes and Value Added Tax (VAT).
- 2.3. Bid prices must include all expenses, disbursements and costs (e.g. transport, insurance, packaging, delivery, accommodation, etc.) which may be required for the execution of the bidder's obligations in terms of the Contract. Bid prices 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 bid is successful), unless otherwise specified.
- 2.4. All bid prices will be final and binding.
- 2.5. A bid will not be invalidated if the amount in words and the amount in figures do not correspond, in which case the amount in words shall be read out at the bid opening and shall be deemed to be the bid amount; therefore, where there is a discrepancy between the amount in figures and the amount in words, the amount in words shall apply.
- 2.6. Where the value of an intended contract will exceed R1,000,000.00 (R1 million) or exceed R1,000,000.00 (R1 million) per annum it is the bidder's responsibility to be registered with the South African Revenue Service (SARS) for VAT purposes in order to be able to issue tax invoices. Pikitup will deem the price above R 1 000 000,00 (R1 million) to be VAT inclusive even if it is indicated that no VAT is charged. The bidder must ensure that provision is made for VAT in these instances, and that the bid price is an all-inclusive rate.
- 2.7. If a bidder becomes a registered VAT vendor during the contract period, the prices/rates as per the initial award will be considered to be inclusive of VAT and no price adjustment(s) will be allowed.
- 2.8. The amended Value-Added Tax Act requires that a Tax Invoice for supplies in excess of R3,000 should, in addition to the other required information, also disclose the VAT registration number of the recipient, with effect from 1 March 2005.

- 3. **FORWARD EXCHANGE RATE COVER** Rates and prices offered by the bidder must be written onto the pricing schedule or form of offer of this document by hand, completed in full and originally signed by the duly authorised signatory. In the event of price(s) based on the exchange rate, the successful bidder(s) will be required to obtain exchange rate cover in order to protect the Municipality against exchange rate variations.
 - 3.2. The bidder must provide proof of forward exchange rate cover within 14 days after an order was placed.
 - 3.3. If proof that forward exchange rate cover was taken out within 14 days after the order was placed but is not submitted to the Municipality along with the invoice, the contract price adjustment will not be accepted, and the contract may be cancelled.

- 4. **SUBMITTING A BID** Bids may only be submitted on the tender documentation that has been issued. Printed Activity Schedules, in the same format (that is, layout, scheduled items and quantities) as those issued electronically by Pikitup upon request, may be submitted as stated in the tender document.

- 4.2. Bid document in a sealed envelope and clearly marked with the “tender reference number, the title of the tender, and the bidding company name”, must be deposited in the Pikitup tender box as indicated in the notice of the bid, on or before the closing date and time of the bid.
- 4.3. Sealed bid documents must be deposited in the Pikitup Tender box situated at the Pikitup Head Office, Ground Floor, East Wing, Pikitup Tender Office, Jorissen Place, 66 Jorissen Street, Braamfontein, unless specified differently in the invitation to tender document.
- 4.4. Any bid received without the “Bid Number and / or Title” clearly endorsed on the envelope will not be opened and read out during the bid opening session and will not be considered
- 4.5. This bid closes strictly as per the details indicated on the cover page of this tender document. No late bids will be accepted or considered for evaluation after the closing date and time. Bid documents deposited into the tender box after the closing date and time will be recorded as late bids and the bidder will be contacted to collect the bid document. Bids responses sent or delivered to any other address besides the address stated in the tender document will not be considered. Telegraphic, telephonic, telex, fNeither PIKITUP nor any of its employees shall be liable in any way whatsoever for Bids that are not placed in the tender/bid box before the closing date and time. The bidder is advised to check the number of pages, ensure pages are in the correct order, and to satisfy himself that none are missing or duplicated.
- 4.11. The bidder must ensure that his/her bid document are clearly marked with the relevant subsections, that the subsections and supporting documents of the bid submission are filed in a chronological order, and that the bid document is securely bound. Pikitup will not take any responsibility for pages, sections, information or supporting documents that are unclear, not evidently labelled, incorrectly filed or out-of-place.
- 4.12. All supporting documents must be submitted by either stapling it to the relevant form in the bid document, or by submitting a bound annexure containing all supporting documents.
- 4.13. Pikitup will not take any responsibility for missing or lost pages, in cases where the bidder submits loose pages, that are not securely attached to the bid document or annexure with supporting documents. No Bid shall be considered unless it is accompanied by sufficient information to show that the goods or services offered fully comply with the specification and bid requirements. Bid documents submitted in the tender box and recorded in the tender register at the closing date may not be returned to the bidder, given that all bid documents must be kept on record for audit purposes. Bid documents may only be made available to the respective bidders where the tender was cancelled or an erratum issued by Pikitup prior to the tender closing date. Bidding documents must be completed properly in permanent black or blue ink, and no correction fluid or correction tape may be used in the bid document. If the bidder wishes to make a change, the bidder must draw a neat line through the incorrect wording, write the correct wording next to the change, and initial next to the change. Bidders must state the country of origin, and the name of the manufacturer or brand of the goods offered. Documentary proof must be produced to verify the aforementioned, if required. **BID OPENING** Bids shall be opened in public at the Pikitup Tender Offices as soon as possible subsequent to the closing time for the receipt of bids. Where practical, prices will be read out at the time of opening bids. Pikitup will record in a tender register which is open to public inspection the details of bids received by the closing date and time. The electronic version of the tender register will subsequently be published on the Pikitup website. Any bid received after the appointed time for the closing of bids **shall not be considered** but shall be filed unopened and / or the bidding company will be contacted to collect the bid. **VALIDITY PERIOD** Your bid submission must remain valid for a period of **90 days** from the closing date of this bid, unless specified differently in the tender document. It will constitute an offer which remains open for acceptance during the validity period. **BRIEFING OR INFORMATION MEETING**
- 7.1. Where the bid document specifies that a compulsory site visit, briefing, or information meeting will be held as per the details provided on the cover page of the bid document, it is a requirement of the bid that the bidder’s representative must attend the briefing session as important information pertaining to the bid will be discussed at the meeting. Bidders must attend the compulsory briefing session and ensure to sign the attendance register. Non-attendance or omitting to sign the attendance register for the compulsory briefing meeting will result in your bid being disqualified for further evaluation.
- 7.2. Where the bid document specifies that the information meeting is not compulsory, attendance of the meeting would be optional to accommodate questions relating to the bid.
- 7.3. Where the bid document specifies that no briefing or information meeting will be held. Queries or questions relating the bid must be email to the contact person as indicated in the bid document.

8. EVALUATION OF BIDS

- 8.1. Bidders must fully comply with all the minimum pre-compliance evaluation criteria and must meet the minimum functionality evaluation criteria threshold (if applicable) to be considered for further evaluation. The tenders will be evaluated on the basis of the point system as stipulated in the PPPFA. The 80/20 principle will apply for tendered prices up to R50 000 000 (fifty million rand), and the 90/10 principle will apply for tender prices with a Rand value above R 50 000 000 (fifty million rand), unless stated differently in the tender document. Subsequent to the aforementioned, objective criteria may apply.

9. EVALUATION AND ADJUDICATION CRITERIA

- 9.1. The tender will specify the applicable evaluation and adjudication criteria, which may include but not limited to the following:
 - 9.1.1. Relevant minimum administrative and legislative requirements
 - 9.1.2. Relevant specifications;
 - 9.1.3. Value for money;
 - 9.1.4. Capacity and capability of bidders to execute the contract;
 - 9.1.5. PPPFA and associated regulations (including price and preference); and
 - 9.1.6. Any other objective criteria specified in the tender.

10. REQUIREMENTS OF A VALID BID

- 10.1. The following duly completed documents and / or information must be submitted with the submission of the bid. Failure to comply with this requirement may invalidate the bid. The bid may not be considered, and no further correspondence will be entered into with regard to the following matters:
 - 10.1.1. Non-submission of pre-compliance documentation,
 - 10.1.2. The tender has not been completed in non-erasable handwritten black or blue ink,
 - 10.1.3. Incomplete Pricing Schedule or Bill of Quantities,
 - 10.1.4. A Form of Offer not signed in non-erasable black or blue ink,
 - 10.1.5. Bid submissions with material alterations or corrections not in compliance with Clause 1.6 above will be rejected.
- 10.2. Pikitup may, after the closing date, request additional information or clarification of tenders in writing in compliance with the SCM Policy and SCM Procedure Manual, which may include but not limited the following:
 - 10.2.1. To obtain an updated National Treasury Central Supplier Database registration form if information is no longer compliant or outdated
 - 10.2.2. To obtain a valid Tax Clearance Certificate and / or PIN if the certificate has expired, no longer compliant, or become inactive after the closing date of the tender;
 - 10.2.3. To clarify or verify pricing where the prices are unclear or an obvious error or mistake has been detected, e.g. a total price was given instead of a unit price or vice versa; arithmetical error detected, etc. The bidder may however not be given an opportunity to increase the total bid price.
 - 10.2.4. To give the bidder the opportunity to pay overdue municipal accounts.
 - 10.2.5. To obtain income tax number(s) from the recommended bidder;
 - 10.2.6. Where an omission on a document is purely administrative in nature, example: MBD document not initialled, fully signed, or a section not fully completed, the bidder may be given an opportunity to correct the omission that is administrative in nature.
 - 10.2.7. No clarification or communication will be entered into with the bidder and / or the bidder will not be given a second opportunity to submit documentation that were a tender requirement, if the relevant documentation was not submitted in the first instance.

11. TEST FOR RESPONSIVENESS

- 11.1. A Bid will be considered non-responsive if:
 - 11.1.1. - the bid is not in compliance with the tender specifications;
 - 11.1.2. - the bidder has not fully submitted all the returnable documents as listed in the bid document; and/or
 - 11.1.3. - the bidder has failed to clarify or return any supporting documentation within 5 business days of being requested to do so in writing.
- 11.2. Pikitup reserves the right to accept or reject:
 - 11.2.1. - any variation, deviation, bid offer, or alternative bid offer; or may cancel the bidding process and reject all bid offers at any time before the formation of a contract. Pikitup shall not accept or incur any liability to a bidder for such cancellation and/or rejection, and will only provide written reasons for such action upon receipt of a written request to do so;
 - 11.2.2. - a bid offer which does not, in Pikitup's opinion, materially and/or substantially deviate from the terms, conditions and specifications of the bid document.
 - 11.2.3. - the whole bid or part of a bid or any item or part of any item, or to accept more than one bid (in the event of a number of items being offered), and the Municipality is not obliged to accept the lowest or any bid.
- 11.3. Pikitup has the right to summarily disqualify any bidder who, either at the date of submission of a bid or at the date of its award, is indebted to Pikitup or the City of Johannesburg Municipality in respect of any municipal rates and taxes or municipal service charges for more than three months. However, an agreement signed by the bidder whereby the bidder agrees that a percentage or fixed amount at the discretion of the municipality, be deducted from payments due to him/her for this bid, until the debt is paid in full, may be considered for acceptance by Pikitup.

12. INCORRECT BID INFORMATION

BID REFERENCE NUMBER PU143/2024 FOR THE APPOINTMENT OF A PANEL OF A MAXIMUM 30 MULTI-DISCIPLINARY CONSULTANTS TO SUPPORT PIKITUP (SOC) LTD ON VARIOUS PROJECTS ON AN AS AND WHEN REQUIRED BASIS FOR THE PERIOD OF 36 MONTHS FROM THE DATE OF APPOINTMENT

- 12.1. Where a contract has been awarded on the strength of the information furnished by the bidder which after the conclusion of the relevant agreement, is proven to have been incorrect, Pikitup may, in addition to any other legal remedy it has or may have, recover from the contractor all costs, losses or damages incurred or sustained by Pikitup as a result of the award of the contract.
13. **WITHDRAWAL OF BID DURING AND / OR AFTER THE SCM PROCESS**
- 13.1. When a bidder withdraws his/her bid during the SCM bidding process, it must be in writing, prior to the award of the bid, of which Pikitup holds the right to accept or reject with or without a claim for any damages.
- 13.2. When a bidder withdraws or cancels the contract after award of the bid to the particular successful bidder, the awarded bidder will be held responsible for any damages or administrative expenses incurred prior to the award of the bid.
14. **NEGOTIATIONS**
- 14.1. The award of the tender may be subject to negotiations of the final terms and conditions of the anticipated contract with the preferred bidders.
- 14.2. The negotiations may include but not limited to price negotiations and / or negotiations on any other terms and conditions of the anticipated contract(s) with the preferred bidders prior to final award.
15. **ADJUDICATION OF BIDS**
- 15.1. Bids submitted in response to this invitation will be adjudicated by PIKITUP in terms of the Supply Chain Management Policy and Procedure Manual developed in accordance with the requirements of the Municipal Finance Management Act 56 of 2003, the Preferential Procurement Policy Framework Act # 5 of 2000, and the Preferential Procurement Regulations of 2022, and related legislative requirements. Enquiries in respect of the policy should be addressed via email to PIKITUP's General Manager: Supply Chain Management, Mhloti Maluleke at mihlotim@pikitup.co.za.
16. **CONTRACT**
- 16.1. The terms of the proposed contract with PIKITUP are contained in the General Conditions of Contract, the Special Conditions of Contract and any of the sections of these bidding documents in which the bidder makes an undertaking as to its performance. You must read and understand the terms before you submit your BID as you will be bound by the Contract (as described) if your BID is successful.
17. **ADMINISTRATIVE JUSTICE**
- 17.1. In adjudicating bids, PIKITUP shall comply with the requirements of the Promotion of Administrative Justice Act 3 of 2000 and the Promotion of Access to Information Act 2 of 2000, to the extent that these Acts apply to the adjudication by a municipal entity of bids in response to a bid invitation.
18. **INTERNAL APPEAL PROCESS**
- 18.1. Following the evaluation of tender and selection of a preferred bidder, and provided that a procurement contract has not already entered into force, any bidder may submit a complaint in writing to the chairperson of the PIKITUP Board of Directors ("the Board") or the Managing Director that PIKITUP has not complied with the requirements of the PIKITUP Supply Chain Management Policy or the PIKITUP Code of Ethics, or has in any respect acted in a way that is irregular. The Chairperson of the Board or Managing Director shall not entertain a complaint unless it was submitted within 20 calendar days of when the supplier or contractor submitting it became aware of the circumstances giving rise to the complaint or of when that supplier or contractor should have become aware of those circumstances, whichever is earlier; or entertain a complaint after the procurement contract has entered into force.
- 18.2. Unless the complaint is resolved by mutual agreement of the bidder and the Chairperson of the Board or Managing Director, the Chairperson of the Board shall, within 30 calendar days after the submission of the complaint, issue a written decision. The decision shall state the reasons for the decision; and if the complaint is upheld in whole or in part, indicate the corrective measures that are to be taken.
- 18.3. The decision of the Chair of the Board shall, subject to the review powers of any competent court, be final.
19. **PROVISO**
- 19.1. In evaluating bids received and adjudicating the award of this tender, Pikitup Johannesburg (SOC) Limited will, in addition to the pre-compliance and functionality criteria included in the specifications and irrespective of the capital, pricing and black economic empowerment structures of the bidder, take into account as objective criteria (1) the desirability of rotating the work amongst service providers, (2) the past bidding practices of any bidder in relation to evidence and/or reports of combative practices including conduct reported, amongst others, in terms of the Prevention and Combatting of Corrupt Activities Act,

2004, (3) the past contractual performance of any bidder and (4) the nature and extent of disputes involving the bidder in relation to past and/or current contracts. Note that as a result of the application of these objective criteria, the highest scoring bidder(s) will not necessarily be selected as a preferred bidder(s).

- 19.2. In line with the provisions of Supply Chain Management Policy, Pikitup reserves the right to:
- request for a validity extension, if necessary,
 - apply pre-qualification criteria to advance designated groups in terms of the PPPFA of 2000, Preferential Procurement Regulations of 2022, and the Pikitup SCM Policy,
 - award the bid in whole, or award the bid in parts, or not to award the bid at all,
 - award the bid to one or more than one bidder(s),
 - not bind itself to accept the lowest bid or any other bid in whole or in part,
 - negotiate the bid price offered, and / or any other terms and conditions of this requirement with the preferred bidder(s), before the final award of the bid.
- 19.3. Pikitup further retain the right to:
- veto or conduct a due diligence on any bidder, and / or any of their sub-contractors or sub-service providers;
 - request for samples, demonstrations, site visits or further information relating to the offered goods, services or works;
 - evaluate, review, test, inspect any of the products and / or staff offered for the tender, at Pikitup's sole discretion accept or reject such;
 - apply objective criteria.
- 19.4. As per section 2(1)(f) of the PPPFA, one or more of the following "objective criteria" may be considered for final selection of bid(s). Objective criteria may include but are not limited to the following objectives or goals:
- The spread of business amongst suppliers and / or rotation of contracts amongst suppliers,
 - The protection of the environment or sustainability considerations,
 - Geographical localisation of the bidder i.e. within City of Johannesburg, within Gauteng Province, within South Africa, etc.
 - The geographical origin of resources utilised as inputs for the execution of the proposed contract,
 - The development and / or impact on the local community,
 - Considerations of after purchase costs, such as maintenance cost, operational costs, licence costs, or life cycle cost,
 - Variants from the original scope of requirements,
 - Financial stability and commercial status of the bidder(s),
 - The receipt of an abnormally low bid amount, provided that the bidder in question is allowed an opportunity to justify its bid.

20. **DECLARATION BY BIDDER**

- 20.1. I the undersigned, (Name and Surname), being the duly authorised undersigned representative of the Bidder and its associates hereby grant Pikitup Johannesburg (SOC) Limited the required consent in terms of the Protection of Personal Information (POPI) Act, 2013 for the use of the personal information relating to the Bidder (i.e. the company, its owner(s), employees and/or any associated persons' BEE credentials, demographic / ownership profile, location etc.) for the legitimate purposes relating to this bid submission, its evaluation and adjudication.
- 20.2. I FURTHER DECLARE THAT I/WE HAVE READ THE CLAUSES SET OUT IN THE CONDITIONS OF TENDER ABOVE AND ACCEPT THE CONTENTS, SUBJECT TO ANY DECLARATION, WE HEREBY OFFER TO CONTRACT WITH PIKITUP ON THE TERMS SET OUT IN THE BID DOCUMENTS SHOULD WE BE APPOINTED AS THE SUCCESSFUL BIDDER.

AUTHORISED SIGNATURE :

CAPACITY OF SIGNATORY :

DATE :

ADDRESS :

WITNESSES: 1 WITNESSES: 2

ANNEXURE 2

TERMS OF REFERENCE / SPECIFICATION OF REQUIREMENTS



TENDER REFERENCE NUMBER PU143/2024

TERMS OF REFERENCE / SCOPE OF WORK

1. BACKGROUND

- 1.1. Pikitup has 12 Depots that deal with operations, 42 garden sites that are used for the collection and disposal of garden waste and other recyclables, 6 buyback centers with recyclers, 4 operating/active, and 2 closed landfill sites.
- 1.2. All this infrastructure requires continuous maintenance, upgrading, and refurbishment to ensure that it complies with all regulations and can sustain Pikitup operations

2. CLIENT OBJECTIVE

- 2.1. Pikitup's objective is to enter into a framework contract with a maximum of 30-panel members of multi-disciplinary consulting professions to support Pikitup (SOC) Limited on various projects, on an as-and when-required basis for a period of three years (36 months) from the date of appointment
- 2.2. Pikitup seeks to ensure that, in the interest of public health and safety and the promotion of a healthy and sustainable environment for all citizens of the country, unrealistically low or high fees for professional engineering services are avoided while maintaining free and open competition among professionals with similar skills and competence. In this way, the Pikitup seeks to: -
 - 2.2.1. Avoid unnecessary public and project risks resulting from the cutting of corners in analysis and design efforts in infrastructure development to meet pressures to reduce costs.
 - 2.2.2. Ensure high levels of infrastructure effectiveness by promoting the appropriate professional input in its planning, design, construction, operation, and maintenance, the cost of which makes up only a very small amount of the total lifecycle cost of infrastructure.
 - 2.2.3. Ensure that highly skilled professionals are made available to support Pikitup Waste Management projects.
 - 2.2.4. Ensure that infrastructure development, which is critically needed to meet the developmental objectives of South Africa, is not delayed or shelved because of unrealistically high capital costs due to poor quality professional engineering services.
 - 2.2.5. Avoid inadequate engineering in the design of infrastructure projects, which often results in high development, maintenance, and or, operating costs as well as high exposure

3. CATEGORIZATION OF PANEL ACCORDING TO PROFESSION

- 3.1. Bidders are required to select the category in which they specialise and are interested to be placed on the panel. Each category will be evaluated the same in the first stage and will be evaluated on the different functionality/quality criteria in the second stage depending on which category is selected by the bidder.
- 3.2. NB: If the Bidder's category choice of disciplined to be considered for on this panel/pool, is not indicated or chosen by the bidder the bid will be considered non-responsive and will not be evaluated further.

PROFESSIONAL DISCIPLINE IN EACH CATEGORY	MAXIMUM NUMBER OF SERVICE PROVIDERS (PANEL MEMBERS) REQUIRED PER CATEGORY
CATEGORY A - PROJECT MANAGEMENT CONSORTIUM (Minor PPP projects including application for funding, with project value from R 0.00 million – R 10 million)	
Program/Project Management	4
Legal Consultant	
Bussiness Consultant	
Community Participation Consultant	
Civil and Structural Engineers Consultant	
Architect	

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Mechanical Engineers with wet services	
Electrical Engineers Consultant	
Quantity Surveyor	
Land Surveyor	
Environmental Consultant	
Health and Safety Consultant	
Conveyancers	
Town Planners	
CATEGORY B - PROJECT MANAGEMENT CONSORTIUM (Major PPP projects and application for funding, with project value from R 10 million and above)	
Program/Project Management	4
Legal Consultant	
Bussiness Consultant	
Community Participation Consultant	
Civil and Structural Engineers Consultant	
Architect	
Mechanical Engineers with wet services	
Electrical Engineers Consultant	
Quantity Surveyor	
Land Surveyor	
Environmental Consultant	
Health and Safety Consultant	
Conveyancers	
Town Planners	
CATEGORY C - ENGINEERING SERVICES (Minor infrastructure projects including depots, garden sites, and buyback center, with project value from R 0.00 million – R 50 million)	
Program/Project Manager	10
Civil Engineer/Structural Engineer	
Architecture	
Quantity Surveyor	
Land Survey	
Electrical Engineer	
Mechanical Engineer	
Geotech Engineering Services	
Traffic Engineering Services	
Stormwater Management Service	
Civil Engineer/Structural Engineer	
Architecture	
Quantity Surveyor	
Electrical Engineer	
Mechanical Engineer	
CATEGORY D - SPECIALIST STUDIES (including noise impact study, traffic study, air quality impact, stormwater management plan, ecology & risk study, with the service value from R 0.00 million – R 5 million)	
Professional Environmental Management	4
Feasibility Studies	
Environmental Assessment Specialist	
CATEGORY E-LAND SURVEYOR (with service value from R 0.00 million – R 5 million)	
Professional Land Surveyor	4
CATEGORY F- TOWN PLANNING SERVICES (Including sub-divisions, consolidation, division of land, concert use, rezoning, township establishment, and removal of restrictions, with service value from R 0.00 million – R 5 million)	
Town Planners	4

4. THE SCOPE OF WORKS

4.1. CATEGORY A AND B (PROJECT MANAGEMENT CONSORTIUM)

BID REFERENCE NUMBER PU143/2024 FOR THE APPOINTMENT OF A PANEL OF A MAXIMUM 30 MULTI-DISCIPLINARY CONSULTANTS TO SUPPORT PIKITUP (SOC) LTD ON VARIOUS PROJECTS ON AN AS AND WHEN REQUIRED BASIS FOR THE PERIOD OF 36 MONTHS FROM THE DATE OF APPOINTMENT

4.1.1. Pikitup's objective in procurement of a project Management Consortium is to have a team of professional services, that provide a broad scope of service inhouse. The function of a project management consortium will be implementing the PPP (Private Public Partnership) projects. To provide support to Pikitup in the development of business plans in order for the application of funding from the private sector, for the development of integrated waste management facilities.

4.1.2. The deliverables will typically include the: -

- The management and administration of the Planning and Delivery Programmes of projects within Pikitup at various project stages through a designated Programme Manager.
- Development of a detailed Programme and Project Work Plan and cash flow within 1 week of award of this bid.
- To develop Business plans inclusive of the financial plan for each of the individual projects
- Assist in the development of programme and project management policies, processes, procedures and systems that will be utilized during the period of contract for the sound planning, management and implementation of Pikitup projects.
- Programme projects to be planned and implemented during the Contract period, as well as the overall financial forecasting for the entire planning and delivery programme of subsidized housing projects.
- Assist in the management of all compliances that are required through the entire planning and delivery value chain of Pikitup projects, including monitoring and reporting as would be required by the city .
- Provide assistance for the management of Internal and External Stakeholders that form part of the entire planning and delivery value chain of Pikitup in order to ensure seamless integration of all Human Settlement components (from feasibility to implementation) of projects.
- Formal capacity building (skills transfer) program to maximize job creation.
- Monitoring, evaluation and reporting, in the required format of the city.

4.2. CATEGORY C (ENGINEERING SERVICES)

Pikitup's objective in procurement of an engineering services is to have a team of professional services, that would provide support to the Project Management Office for the development of new and maintenance of existing infrastructure. This contract is meant for or targeting Consultants with a proven track record in Municipal infrastructure development projects in Building, Roads, Stormwater, Environmental Management, Landfill site, Water and Sewer reticulations.

4.2.1. Stage 1 – Inception

4.2.1.1. Establish client requirements and preferences, refine user needs and options, appointment of necessary sub-consultants (specialist consultants), and establish the project brief including project objectives, priorities, constraints, assumptions, spirations and strategies.

4.2.1.2. Deliverables will typically include the

- Agreed services and scope of work.
- Signed agreement.
- Report on project, site, and functional requirements.
- Schedule of required surveys, tests, analyses, site, and other investigations.
- Schedule of consents and approvals and related lead times.
- Submit for approval by the client representatives

4.2.2. Stage 2 – Concept and Viability (also termed Preliminary Design)

4.2.2.1. Prepare and finalize the project concept in accordance with the client brief, Including project scope, scale, character, form, and function, plus preliminary program and viability of the project.

4.2.2.2. Typical deliverables will include:

- Concept design.
- Schedule of required surveys, tests, and other investigations and related reports.

- Process design.
- Preliminary design.
- Cost estimates as required.
- Submit for approval by the client representatives

4.2.3. **Stage 3 – Design Development (also termed Detail Design)**

4.2.3.1. **Develop** the approved concept to finalize the design, outline Specifications, cost plan, financial viability, and program for the project

4.2.3.2. Typical deliverables will include:

- Design development drawings.
- Outline specifications.
- Local and other authority submission drawings and reports.
- Detailed estimates of construction costs.
- Submit for approval by the client representatives

4.2.4. **Stage 4 – Documentation and Procurement**

4.2.4.1. **Prepare** procurement and construction documentation, and confirm implement the procurement strategies and procedures for effective and timeous procurement of necessary resources for execution of the project.

4.2.4.2. Typical deliverables will include:

- Specifications.
- Services coordination.
- Working drawings.
- Budget construction cost.
- Tender documentation.
- Tender evaluation report.
- Priced contract documentation.

4.2.5. **Stage 5 – Contract Administration and Inspection**

4.2.5.1. Manage, administer, and monitor the construction contracts and processes including preparation and coordination of procedures and documentation to facilitate practical completion of the works.

4.2.5.2. Typical deliverables will include:

- Schedules of predicted cash flow.
- Construction documentation.
- Drawings register.
- Estimates for proposed variations.
- Contract instructions.
- Financial control reports.
- Valuations for payment certificates.
- Progressive and draft final account(s)
- Practical completion and defects list
- All statutory certification and certificates of compliance as required by the Local and other Statutory Authorities

4.2.6. **Stage 6 – Close-Out**

4.2.6.1. **Fulfill** and complete the project close-out including necessary documentation to facilitate effective completion, handover, and operation of the project)

4.2.6.2. Typical deliverables will include:

- Valuations for payment certificates
- Works and final completion lists
- Operations and maintenance manuals, guarantees and warranties
- As-built drawings and documentation
- Final accounts

4.2.7. Additional Services pertaining to all Stages of the Project

All services related to defining the scope of work that are normally paid for on a time and cost basis.

4.2.7.1. Valuation for purchase, sale or leasing of plant, equipment, material, systems, land or buildings or arranging for such valuation.

4.2.7.2. Making arrangements for way leaves, servitudes or expropriations.

4.2.7.3. Negotiating and arranging for the provision or diversion of services not forming part of the works.

4.2.7.4. Additional work in obtaining the formal approval of the appropriate Government Departments or Public Authorities and Utilities, including the making of such revisions as may be required as a result of decisions of such Departments or Authorities arising out of changes in policy, undue delay, or other causes beyond the consulting engineer's control.

4.2.7.5. Additional work related to monitoring as required by any Government Departments or Authorities in order to facilitate regulatory approvals and certification (e.g. Mines Health and Safety Act 29 of 1996).

4.2.7.6. Topographical and environmental surveys, analyses, tests and site or foundation or other investigations, model tests, laboratory tests and analyses carried out on behalf of the client.

4.2.7.7. Setting out or staking out the works and indicating any boundary beacons and other reference marks.

4.2.7.8. Preparation of drawings for manufacture and installation or detailed checking of such for erection or installation fit.

4.2.7.9. Detailed inspection, reviewing and checking of designs and drawings not prepared by the consulting engineer and submitted by any contractor or potential contractor as alternative to those embodied in tender or similar documents prepared by the consulting engineer.

4.2.7.10. Travel and accommodation related cost to offsite inspection and testing of materials and plant during manufacture and/or prior to delivery to site.

4.2.7.11. Preparing and setting out particulars and calculations in a form required by any relevant authority.

4.2.7.12. Abnormal additional services by, or costs incurred by the consulting engineer due to the failure of a contractor or others to perform their required duties adequately and on time.

For example:

- When the works Contract is extended beyond the awarded contract period due to poor contractor performance or any other unforeseen circumstances beyond the control of the consulting engineer, attendance at meetings and related inspections are considered as additional services. Alternatively, the portion of the fee due for the Contract Administration and Inspection Stage is adjusted pro-rata to the extended duration versus the originally expected duration.
 - Where more frequent inspections are required due to poor contractor performance or other extraneous factors beyond the control of the consulting engineer, these are normally considered to be additional services.
 - Dealing with excessive, unreasonable and spurious claims by the Contractor.
- 4.2.7.13. Executing or arranging for the periodic monitoring and adjustment of the works, after final handover and completion of construction and commissioning, in order to optimise or maintain proper functioning of any process or system.
- 4.2.7.14. Investigating or reporting on tariffs or charges leviable by or to the client.
- 4.2.7.15. Advance ordering or reservation of materials and obtaining licenses and permits.
- 4.2.7.16. Preparing detailed operating, operational and maintenance manuals.
- 4.2.7.17. Additional services, duties and/or work resulting from project scope changes, alterations and/or instructions by the client, or his duly authorized agents, requiring the consulting engineer to advise upon, review, adapt and/or alter his completed designs and/or any other documentation and/or change the services and/or duties. Such additional services are subject to agreement in writing between the consulting engineer and the client prior to the execution thereof.
- 4.2.7.18. The frequency and extent of site administration and inspections that are required relative to the norm: The frequency and duration of works inspections will depend on many factors, such as the nature, complexity and duration of the project, site location, project programme, contractor competence, important elements of the works being enclosed or covered etc. The norm is that meetings and inspections should occur at an average frequency of once every 2 weeks with more frequent occurrences during critical stages of the works as described for Level 1 Construction Monitoring in 3.3.2 of ECSA guideline. When the frequency of meetings and inspections exceeds this norm then such additional attendance at meetings and related inspections are considered as additional services,
- 4.2.7.19. Preparing record drawings on designs done by others or related to alterations to existing works.
- 4.2.7.20. Work and or services related to targeted procurement that could entail, but is not necessarily limited to any or all of the following:
- incorporation of any targeted participation goals and training outcomes,
 - the measuring of key participation indicators,
 - the selection, appointment and administration of participation and;
 - auditing compliance with the above by any contractors and/or professional consultant.

- 4.2.7.21. Exceptional arrangements, communication, facilitation and agreements with any stakeholders other than the client and contractors appointed for the works on which the consulting engineer provides services.
- 4.2.7.22. Any other additional services, of whatever nature, specifically agreed to in writing between the consulting engineer and the client.
- 4.2.7.23. Arranging forward cover for imported goods, materials or services.
- 4.2.7.24. Construction Monitoring
 - 4.2.7.24.1. Quality assurance (QA) during construction refers to the engineering activities that are implemented to assure the client that works are highly likely to meet the requirements.
 - 4.2.7.24.2. This is achieved through a combination of the quality control processes that are put in place by the contractor to control its outputs and the inspection and acceptance testing that is carried out by the consulting engineer to confirm conformance prior to certification.
 - 4.2.7.24.3. While the contractor takes the ultimate responsibility for quality and meeting the design requirements, the purpose of quality assurance plan and related construction monitoring is to inspect and satisfy the client and the consulting engineer that the risk of these requirements not being met is acceptable.
 - 4.2.7.24.4. This means that the client and consulting engineer should agree a satisfactory arrangement in respect of construction monitoring that suits the type of work, the project location and the duration of the critical aspects of the works. Disagreement regarding the required level of construction monitoring should not be taken light.
 - 4.2.7.24.5. The level of construction monitoring and the frequency and duration of the site visits must be agreed with the client prior to commencement of the works and should be recorded in the agreement with the client. The level of construction monitoring and activities related to the quality assurance plan may change during the course of the works to reduce quality related risks and this will require an amendment of the agreement.
 - 4.2.7.24.6. The stage 5 construction monitoring services described in 3.2.5 as per the ECSA guideline above will normally suffice for simple projects where more regular inspections are not required other than during critical stages of the works with less frequent visits once the portion of the works in which the consulting engineer is involved has largely been completed. However, there are many other situations where more regular construction monitoring is required for quality assurance and certification.
 - 4.2.7.24.7. Aspects that need to be considered when determining the degree to which additional construction monitoring services are required are:
 - (a) The type of work.
 - (b) The discipline of the work (civil, structural, mechanical, electrical etc.).
 - (c) The competency and reputation of the **contractor** and its related quality control system.
 - (d) The speed with which critical elements of the work are covered.
 - (e) The consequences of non-compliance.
 - (f) Timing and ease of subsequent detection and rectification of non compliances.

4.2.7.24.8. Arising from the above, three levels of **construction monitoring** may be defined and described, as follows:

- (a) Level 1: Periodic **Construction Monitoring (Normal Services i.e. no additional services)** The consulting engineer's staff shall:
 - (i) Visit the **works** at a frequency of once every two weeks on average over the duration of the **works**, with additional visits for **works** completion inspections and inspections for **works** defects lists.
 - (ii) Review random samples of material and work procedures that will coincide with the normal frequency of visits, for conformity to the contract documentation, and review random samples of important completed work prior to covering up, or on completion, as appropriate.
- (b) Level 2: Part-time **Construction Monitoring (Normal Services for building structures and additional services involving part-time staff paid for by the client for other disciplines and projects)** The consulting engineer's staff or part-time **construction monitoring** staff shall:
 - (i) Regularly visit the site at a frequency which may vary during the course of the **project**, and such visits may be daily or weekly, according to the demands of the **project and requirements of Pikitup**.
 - (ii) Regularly, review samples of materials and work procedures that may require more frequent visits than required for Level 1, for conformity to contract documentation, and review regular samples of important completed work prior to covering up, or on completion, as appropriate.
 - (iii) Where the **consulting engineer** is the sole professional service provider or **principal agent**, carry out such administration of the **project** as is necessary on behalf of the **client**.
- (c) Level 3: Full-time **Construction Monitoring** (Full time staff seconded to the client for the duration of the **works** and paid for by the **client**) The full-time **construction monitoring** staff shall:
 - (i) Maintain a full-time presence on site to constantly review samples of materials and work procedures, for conformity to contract documentation, and review completed work prior to covering up, or on completion, as appropriate.
 - (ii) Assist with the preparation of as-built records and drawings to the extent required in **the agreement** with the **client**
 - (iii) Where the **consulting engineer** is the sole professional service provider or **principal agent**, carry out such administration of the **project** as is necessary on behalf of the **client**.

4.2.7.24.9. Most structural engineering work typically requires at least Level 2 monitoring, and the costs associated with this level of monitoring are included in the guideline fee for building projects to facilitate agreements. For example, in structural concrete work the correct position of reinforcing steel may need to be witnessed for all elements of the structure prior to pouring concrete. The **consulting engineer** may also require acceptance testing of the concrete on a regular basis depending on the quality controls instituted by the **contractor** as part of the **quality assurance plan**.

4.2.7.24.10. In the case of large civil **works** where all materials and elements are generally regarded as being critical and are covered on a daily basis, work is monitored on

a continuous basis for the duration of the **works** and Level 3 monitoring usually applies. This level is also applied to the structural **works** that are included in such projects.

- 4.2.7.24.11. In the case of some mechanical and electrical **works** related to simple routine projects, such as general educational buildings, primary healthcare and some institutional building projects, Level 1 monitoring is usually sufficient. On projects where a significant portion of the work is rapidly covered, such as projects involving underground services and building projects like secondary healthcare, tourism and leisure, commercial, retail and office buildings with complex electrical and mechanical **works**, Level 2 or Level 3 construction monitoring is normally required.
- 4.2.7.24.12. Where Level 2 **construction monitoring** is required as an additional service and the **works** are located close to the **consulting engineer's** offices, it may be economical to provide the additional service using the consulting engineer's office staff on a time and cost basis. Where the **works** are more remote it may be more cost-effective to second full time or part time staff to the project to carry out the necessary inspections. In all instances the **consulting engineer** will, with prior written approval having been obtained from the **client**, appoint or make available additional staff for such construction monitoring on site to the extent specifically defined in **the agreement**.
- 4.2.7.24.13. In some instances, staff are made available by the **client** to assist in **construction monitoring** in which cases these persons should report to and take instructions from the **consulting engineer** or an authorized representative of the **consulting engineer** to avoid mixed messages being passed to the **Contractor**. The **client** and the **consulting engineer** should agree on the relevant and appropriate experience of the staff so appointed by the **client**.

4.2.8. Time Based Fees

- 4.2.8.1. Appointments for time-based fees are normally made where the scope of work is not clearly defined at the time of appointment of the **consulting engineer**. This provides an opportunity for both the client and consulting engineer to modify the scope as work proceeds to develop confidence in the study and design outputs and to investigate issues that are uncovered as the work progresses. Time-based fees are also appropriate for small projects and for certain types of specialist appointments.
- 4.2.8.2. The background to these rates is that, on average, the total overhead costs of a consulting engineering firm are normally very similar to the total cost of salaries of technical staff engaged on projects. Such overheads include rentals, management, administrative and insurance costs. When the cost of unutilised time is added to this, the cost of each technical hour spent on projects can amount to some 2.5 x the total cost of employment of the technical person excluding any profit. The factors below are based on this and are adjusted per category to make allowance for the reduced time spent on projects by senior staff who spend more time on management, marketing and industry matters.
- 4.2.8.3. Where a professional person is seconded full time to a project and has no office rental or accommodation costs, or unutilised time spent on administrative duties that are unrelated to the project, the hourly charge out rate could be around 2/3 of the rates shown. Similarly, where an engineer has retired or seeks only part-time employment and has no corporate overhead costs, such a person could charge hourly rates that are less than half of the rates shown.
- 4.2.8.4. Time based fees are all-inclusive fees, including allowances for

overhead charges incurred by the consulting engineer as part of normal business operations, including the cost of management, as well as payments to administrative, clerical and secretarial staff used to support professional and technical staff in general and not on a specific project only.

- (a) Time based fees are calculated by multiplying the agreed hourly rate (for which guidelines are provided in sub-clauses (2), (3) and (4)), which is applicable to the consulting engineer, or any other technical staff employed by the consulting engineer, with the actual time spent by such technical staff in rendering the services required by the client.
- (b) Technical staff include all staff performing work directly related to the execution of the services the consulting engineer is engaged for by the client and excludes all administrative, clerical and secretarial staff used to support professional and technical staff in general and not on a specific project only, but includes the typing of letters, minutes, reports and documents for projects.

4.2.8.5. To determine the time-based fee rates the persons concerned are divided into:-

- (a) **Category A**, in respect of a private consulting practice in engineering, shall mean a top practitioner with over 20 years of experience whose expertise and relevant experience is nationally or internationally recognized and who provides advice at a level of specialization where such advice is recognized as that of an expert.
- (b) **Category B**, in respect of a private consulting practice in engineering, shall mean a person with over 10 years of experience who acts as partner, a sole proprietor, a director, or a member who, jointly or severally with other partners, co-directors or co-members, bears the risks of the business, or a person that takes responsibility for the projects and related liabilities of such practice and where his/her level of expertise and relevant experience is commensurate with the position, performs work of a conceptual nature in engineering design and development, provides strategic guidance in planning and executing a project and/or carries responsibility for quality management pertaining to a project.
- (c) **Category C**, in respect of a private consulting practice in engineering, shall mean all salaried professional staff who are registered as such in terms of applicable Acts and with adequate expertise (in the range of 3 to 15 years) and relevant experience performing work of an engineering nature and who carry the direct technical responsibility for one or more specific activities related to a project. A person referred to in Category B may also fall in this category if such person performs work of an engineering nature at this level.
- (d) **Category D**, in respect of a private consulting practice in engineering, shall mean all other salaried technical staff with adequate expertise and relevant experience performing work of an engineering nature with direction and control provided by any person contemplated in categories A, B or C.
- (a) based on such indicative time-based fee rates are not to be higher than those as are determined from time to time by various bodies such as the Department of Public Services Administration (DPSA) and ECSA (Engineering Council of South Africa). Provided that in all cases the client and consulting engineer may agree on a more appropriate fee to take account of the specific services to be rendered or expertise to be applied.

4.2.8.6. For the purposes of clause 4.2, the **total annual cost of employment** of a person means the total amount borne by an employer in respect of the employment of such a person per year, calculated at the amounts applicable to such a person at the time when the services are rendered, including –

- (a) Basic salary or a nominal market related salary, excluding profit share and asset growth;
- (b) Fringe benefits not reflected in the basic salary, including:
 - (i) Normal annual bonus;
 - (ii) Employer's contribution to medical aid;
 - (iii) Group life insurance premiums borne by the employer;
 - (iv) Employer's contribution to a pension or provident fund; and
 - (v) All other benefits or allowances payable in terms of a letter of appointment, including any transportation allowance or company vehicle benefit, telephone and/or computer allowances, etc.; and
- (c) Amounts payable in terms of an Act, including:
 - (i) Contributions to the Compensation Fund in terms of the Compensation for Occupational Injuries and Diseases Act;
 - (ii) Contributions to unemployment insurance in terms of the Unemployment Insurance Fund Act;
 - (iii) Levies in terms of the Skills Development Levy Act, and
 - (iv) Recoverable levies to all spheres of government.

4.3. CATEGORY D (SPECIALIST STUDIES)

4.3.1. FEASIBILITY STUDIES

4.3.1.1. The main objective of this service is to appoint professionals that will provide an independent assessment that examine all aspects of a new proposed infrastructure (extension of landfill site, MRF etc) including technical, economic, financial, legal and environmental viability. This information will then assist Pikitup to determine whether or not to proceed with the project.

4.3.1.2. The scope of work will in general include all management and professional input and functions required and necessary to complete a specific feasibility from its current status at the time when the appointment commences up to completion and hand over of the Feasibility Report.

4.3.2. EXTENT OF SERVICES

- Determine and record the current status and or progress to date, as well as land ownership on land or property
- Evaluate the suitability of the proposed development for its intended purpose;
- Identify and record any constraints that have to be removed or mitigated to facilitate implementation of the project;
- Determine an implementation plan including all activities necessary for the successful completion of the project, and
- Establish time frames and cost estimates for the implementation and completion of the project.

4.3.3. ACTIVITIES

4.3.3.1. The main activities for this phase will include but are not limited to the following:

- Determine land ownership status.
- Examine physical properties (geology, topography and flood lines) and environmental issues that may affect feasibility.
- Determine physical planning status and propose appropriate planning process and schedule.
- Determine legal status with regard to surface rights, servitudes and other legalities that may negatively affect the project.
- Determine guiding planning documents and guiding principles for development
- Develop a development proposal/conceptual urban design framework for each project;
- Determine environmental impact and mitigation measures as well as specialist studies that may be needed.
- Determine availability of bulk and link engineering infrastructure.
- Determine layout standards (stand size, road alignment) and level of service in consultation with the City
- Develop an implementation program, responsibility matrix and provisional budget for the project.
- Determine any other constraint that may negatively affect the development potential of the land.
- Make recommendations that may enhance the project and project yield

4.3.4. Environmental Impact Assessment

4.3.4.1. Full EIA Process

The Service Provider shall be responsible for an Environmental Impact Assessment (EIA) including the registration of the activity with GDARD, submission of a scoping Report, public participation, and specialist studies as required by GDARD, for the issue of an Environmental Authorization.

4.3.4.2. Basic Assessment

The Service Provider shall be responsible for the Basic Assessment (BA) including the registration of the activity with GDARD, submission of the Report, public participation, and specialist studies as required by GDARD, for the issue of an Environmental Authorization.

The Employer shall have the right to order any other investigations that is not required or reasonably implied in the Scope of Work should such investigations become necessary for the proper execution and completion of the Works. Such investigations will normally be conducted by a sub-consultant selected by the lead consultant pursuant quotation process. The final appointment of this sub-consultant must be authorized in writing by the council.

4.4. CATEGORY E (TOPOGRAPHICAL SURVEY)

4.4.1. Pikitup's main objectives is to appoint professional land surveyor to provide support to the Disposal Department, in ensuring compliance with the landfill licences in supply the quarterly air space availability and volumes calculations.

4.4.2. The Service Provider shall be responsible for performing a topographical survey if so, required of the site to the extent and detail as required for the environmental impact assessment, township establishment, and the design and construction of bulk and internal civil engineering infrastructure and shall develop a digital terrain model (DTM) from the survey data.

- 4.4.3. Hard copies of plans and electronic copies of the DTM shall be made available to the Employer on request for the Employer's internal use. The tendered sum shall be in full compensation for the topographical survey and the DTM and for copies to be provided to the Employer. The tendered sum is payable on completion of the survey and on submitting of a hard copy and electronic copy of the DTM to the Employer.

4.5. CATEGORY F (TOWN PLANNING)

- 4.5.1. Pikitup's objective is to appoint a professional town planner to support Project Management Office to deal with land use development.
- 4.5.2. Land Use Management is the system of legal requirements and regulations that apply to land in order to achieve desirable and harmonious development of the built environment. Every property in the city has a set of regulations to control development. These regulations are determined by the zoning of the property. Property zoning is set out in the applicable Town Planning Scheme, which determines such aspects as possible land use, floor area, coverage, building lines, parking provisions etc.
- 4.5.3. There are presently different Town Planning Schemes for different areas of the city. It is important to establish which scheme applies to which area, as the specific requirements of the schemes differ. In addition to the zoning regulations, development is also controlled by conditions of title. These conditions are set out in the Title Deed of each property, and can restrict the way in which a property may be developed.
- 4.5.4. Other pieces of legislation that regulate development include the National Building Regulations and Building Standards Act (Act 103 of 1977), the Public Health Bylaws and various other Municipal Bylaws.

4.5.5. EXTENT OF SERVICES

- 4.5.5.1. Town planning processes differs from one Municipality to another. The following town planning process is typically applicable
- The client approaches/appoints a town planner to obtain advice or submit an application for the property;
 - Provides the client with professional advice on the way forward, depending on the type of request;
 - Motivates and compiles the applicable application (Rezoning/permission etc.);
 - Submits the application to the relevant official at City Council, whereafter it is assessed for completeness.
 - When the application is found to be complete, the advertisement process can commence (if applicable).
 - The application then needs to be advertised as prescribed (usually in the Provincial Gazette, print media, on-site and the adjoining owners need to be notified by registered post). An objection period is applicable in this regard.
 - The application is then circulated to various internal departments for their respective inputs and comments, and the town planner takes it upon himself/herself to expedite this aspect of the application.
 - As soon as all the comments from the various departments are positive, the application is handed to the relevant town planner of the Council to evaluate the application for a decision.
 - The application takes several months for approval should no objections be lodged against the application.
 - Should objections be received, the Council will arrange for a town planning hearing.
 - As soon as the application is approved, the owner of the property should comply with the post-approval conditions as set out in the approval letter, if any. A town planner can also assist the client in this regard.

- When the post-approval conditions have been complied with, the new/additional land-use rights come into operation, where after building plans can be submitted for approval.



**JOHANNESBURG
SOC Limited**

PRE-COMPLIANCE AND FUNCTIONALITY EVALUATION

PRE-COMPLIANCE AND FUNCTIONALITY EVALUATION

1. Evaluation Criteria

- 1.1. PIKITUP will establish a Bid Evaluation Committee (BEC) whose responsibility is to make recommendations to the Bid Adjudication Committee (BAC). The Bid Evaluation Committee will evaluate the bids received in accordance with the evaluation criteria stipulated in the invitation document and make a recommendation to the BAC for consideration. The BAC will make a further recommendation to the Managing Director for his / her consideration.
- 1.2. The Bid Evaluation Committee will evaluate bids based on the information and returnable documentation submitted that form part of the respective bid documents.
- 1.3. The evaluation and award would be conducted in two stages. The first stage would be to establish the panel of pre-approved service providers, and the second stage to select a service provider for a specific work package.
- 1.4. The bids will be evaluated during the first stage on pre-compliance criteria and functionality criteria, and during the second stage on price and preference, and objective criteria.
- 1.5. First Stage
 - 1.5.1. The first stage would be evaluated on the pre-compliance and functionality evaluation criteria, and the second stage would be evaluated based on price and preference point allocation, and objective criteria if applicable.
 - 1.5.2. Each category will be evaluated as per the requirements specified for that category.
 - 1.5.3. The pre-compliance evaluation criteria are mandatory requirements which must be met for a bidder to qualify for further evaluation on functionality evaluation. The functionality evaluation would be scored based on the weighted functionality evaluation criteria. The minimum cut off points for functionality is calculated out of a total of 100 points and any bidder scoring less than the minimum threshold do not qualify for further evaluation. Bidders that meet the minimum functionality threshold score do qualify for further evaluation. The bidders that meet the minimum functionality threshold will be ranked based on the functionality evaluation score from the highest to the lowest score in descending order. The highest scoring bidders will be selected in descending order to be included on the panel of pre-approved service providers as per the category limits mentioned above.
 - 1.5.4. Bidders must note that in addition to the aforementioned evaluation criteria, that objective criteria will apply, bearing in mind that information submitted in the respective bids may be verified prior to award. The number of bidders awarded per category will be limited to the maximum number specified in the tender document.
- 1.6. Second Stage
 - 1.6.1. Only bidders that are included on the panel of pre-approved service providers during the first stage will be eligible for invitations during the second stage. Bidders will be invited on an as and when required basis to provide quotations for specific work packages and be given the opportunity to claim preference points in terms of the relevant price and preference point system.
 - 1.6.2. Preference points will be awarded for specific goals as stated in the RFQ invitation. Where it is unclear whether the 80/20 or 90/10 preference point system applies the lowest acceptable bid price will be used to determine the applicable preference point system.
 - 1.6.3. The bidder that scores the highest points for price and preference for the specific work package will be recommended for award unless the objective criteria determine differently.

2. FIRST STAGE EVALUATION

2.1. The following evaluation criteria will apply during the first stage of the process.

3. Pre-compliance Evaluation Criteria and Compulsory Returnable Documents Required:

- 3.1. Bidders may be eliminated for not submitting compulsory returnable documents and / or who do not comply with the pre-compliance evaluation criteria as stated below in line with Pikitup SCM Policies and Procedure Manual.
- 3.2. Bidders are required to attend a Compulsory Briefing session and failure to attend the compulsory briefing session or sign the attendance register will lead to the bidder being disqualified from further evaluation.
- 3.3. The pre-compliance evaluation criteria will apply for all categories, example categories A to F.

Pre-compliance Evaluation Criteria and Compulsory Returnable Documents

- a) To enable Pikitup to verify the bidder's CSD registration and tax compliance status, the bidder must provide;
- Copy of the Central Supplier Database (CSD) registration, where the CSD is fully tax compliant (CSD must not be older than 3 months);
 - or indicate their Master Registration Number / CSD Number; where the CSD is fully tax compliant;
 - or a copy of their Tax Clearance Certificate (TCS);

Note: Refer to MDB 1

b1) Confirmation that the bidding company's rates and taxes are up to date:

- Where the property is owned by the bidding company, an original or copy of the Municipal Account Statement of the bidding company confirming that the account is not in arrears for more than ninety (90) days. The correspondence may not be older than 3 months from date of tender closing; or
- Where the property is leased or the bidding company is a tenant on the property; - a letter of good standing or tenant account statement or sworn affidavit from the landlord or the landlord's appointed property agent are required, confirming that the bidding company has no disputed account and / or that the account is not in arrears for more than ninety (90) days. The landlord letter of good standing, or landlord account statement, or landlord sworn affidavit must reflect the bidding company name. Where the physical address differs from the address indicated on the company registration document (CIPC), the aforementioned landlord confirmation must be accompanied with a signed lease agreement, or
- Where the property is not owned or leased by the bidding company and special arrangements are in place for the bidding company to operate from the landlord's premises (for example: business operating from residence of the director, working from home, operating from premises free of charge, etc.); - a sworn affidavit from the landlord or the landlord agent or the account holder is required, stating the nature of the arrangement with the bidding company and must confirm that the bidding company has no disputed account and / or that the account is not in arrears for more than ninety (90) days

b2) In addition to the above, confirmation is required that rates and taxes are up to date for all the bidding company's **owners / members / directors / major shareholders**:

- Where an owner / member / director / major shareholder is not residing within South Africa; - a sworn affidavit is required from the owner / member / director / major shareholder confirming the aforesaid, or
- Where the property is owned by the owner / member / director / major shareholder; - an original or copy of the Municipal Account Statement of the owner / member / director / major shareholder confirming that the account is not in arrears for more than ninety (90) days, or
- Where the property is leased by the owner / member / director / major shareholder; - a letter of good standing or tenant account statement or sworn affidavit from landlord or the landlord's appointed property agent are required, confirming that the owner / member / director / major shareholder has no disputed account and / or that the account is not in arrears for more than ninety (90) days. The landlord letter of good standing or landlord account statement or landlord affidavit must reflect the relevant owner / member / director / major shareholder name and physical address. Where the physical address differs from the address indicated on the company registration document (CIPC), the aforementioned landlord confirmation must be accompanied with a signed lease agreement, or
- Where the property is not owned or leased, and special arrangements are in place for the owner / member / director / major shareholder to reside at the landlord's premises (for example: residing with wife, husband, partner, family member, etc.); - a sworn affidavit from landlord or the landlord agent or the account holder is required, stating the nature of the residence arrangement for the bidding company's owner / member / director / major shareholder and must confirm that the bidding company's owner / member / director / major shareholder has no disputed account and / or that the account is not in arrears for more than ninety (90) days.

Additional notes relating to B1 and B2:

The above correspondence may not be older than 3 months from date of tender closing.

The "landlord letter" is a document that originate from the landlord or the landlord's agent confirming that the tenant is in good standing or not in arrears for more than 90 days. The landlord letter must be dated and signed by the landlord.

The "landlord affidavit" is a document that originate from the landlord or the landlord's agent confirming that the tenant is in good standing or not in arrears for more than 90 days. The affidavit from the landlord must be signed by the landlord or the landlord's agent, and must also be stamped, signed and dated by a commissioner of oath.

The "landlord statement" is a document that originate from the landlord or the landlord's agent addressed to the tenant confirming that the tenant's account is in good standing or not in arrears for more than 90 days. The landlord statement required is not the municipal account statement of that of the landlord. The "landlord statement" must be on the landlord's or the landlord agent's letter head and dated.

c) Annual Financial Statements for the most recent past three (3) years or financial statements from date of existence for companies less than three years.

NB: The bidder must submit signed audited annual financial statements for the most recent past 3 years, or if established for a shorter period, submit audited annual financial statements from date of establishment.

If the bidder is not obliged by law to prepare signed annual financial statements for auditing purposes, then the bidder must submit their most recent annual financial statements for the past 3 years in accordance with any applicable law, or if established for a shorter period, submit their most recent annual financial statements from date of establishment. Where a bidder is established or operational for

less than 3 years, documented proof must be provided to confirm the date of establishment or date of operational commencement.

If the bidder is not obliged by law to prepare annual financial statements for auditing purposes, they must submit their Public Interest Score (PIS) declaration to confirm that Audited Annual Financial Statements are not a requirement, together with their Annual Financial Statements for the most recent previous three financial years or since establishment.

PIS are as follows:

- Public Interest Score (PIS) of 350 and above, the Annual Financial Statement must be audited
- Public Interest Score (PIS) of 100 to 349, the Annual Financial Statement must be independently reviewed.
- Public Interest Score (PIS) of less than 100, the Annual Financial Statement must be signed by the company representative (example Managing Director, Chief Executive Officer, etc.) however do not have to be audited or independently reviewed.

Note:

- All sets of annual financial statements submitted must be fully signed.
- The AFS will also be used to calculate the financial ratios as specified in the functionality evaluation criteria.

d) Fully completed, duly signed and Declaration Forms per bid annexures (**MBD1, MBD4, MBD5, MBD8 and MBD9**)

Attach letter of authorization to sign the tender documents.

e) Joint venture - (Only applicable if tendering as a joint venture)

For all the companies operating as Joint Ventures, the following must be complied to:

- A joint venture agreement signed by all partners / parties must be submitted. This agreement must explain the roles and responsibilities of all parties including the nominated signatory on behalf of the JV.
- All JV partners or parties must submit all relevant compulsory documents listed from (a) to (d) above.

NB: It is the condition of this bid that the successful bidder will continue with same JV partner for the duration of the contract. In the event the JV agreement is dissolved, the contract with Pikitup becomes null and void.

3.4. Bidders that do not comply with all the pre-compliance evaluation criteria will be disqualified for further evaluation. Bidders that comply with all the pre-compliance evaluation criteria will qualify for further evaluation on functionality criteria.

4. Other Returnable Documents Required:

4.1. The following additional returnable documents are required for evaluation purposes

Other Returnable Documents	
a)	Proof of Company Registration
b)	Certified Copy of ID Documents of owners/members/directors/ major shareholders
c)	Valid Original or copy of BBBEE Scorecard or sworn affidavit
d)	Company Profile
e)	Attach all supporting documents as required in the Functionality Evaluation criteria included herein
	- Appointment letters as specified in the functionality criteria for the relevant category

BID REFERENCE NUMBER PU143/2024 FOR THE APPOINTMENT OF A PANEL OF A MAXIMUM 30 MULTI-DISCIPLINARY CONSULTANTS TO SUPPORT PIKITUP (SOC) LTD ON VARIOUS PROJECTS ON AN AS AND WHEN REQUIRED BASIS FOR THE PERIOD OF 36 MONTHS FROM THE DATE OF APPOINTMENT

- Contactable reference letters as specified in the functionality criteria for the relevant category
- Qualifications as specified in the functionality criteria for the relevant category
- CV's as specified in the functionality criteria for the relevant category
- Professional registration certificates as specified in the functionality criteria for the relevant category

5. Functionality Criteria

- 5.1. Bidders that complied with all the pre-compliance evaluation criteria qualify for further functionality evaluation for the specific categories applied for.
- 5.2. Each category (i.e. category A to F) will be evaluated independently for functionality evaluation.
- 5.3. A bidder must score at least 70% (i.e. 70 out of 100) or more for a category to qualify for the particular category.
- 5.4. Any score below the 70% threshold does not qualify and bidders scoring less than the threshold will be disqualified for the particular category.
- 5.5. **IMPORTANT NOTES:**
- Bidders must submit the functionality evaluation documents required for each of the categories which are applied for.
 - Documented response for each category must be clearly separated in the bid response.
 - Bidders will only be evaluated for the categories as specified on the cover page of the bid document, and the corresponding returnable documents must be submitted within the particular category provision in Annexure 12.
 - The project values mention in each of the functionality evaluation criteria categories below refers to the professional fees rather than the entire project implementation value.
 - The number of years' experience that will be assessed must be full years. (Example: 6 years and 11 months experience must be rounded down to 6 years' experience, and not 7 years).
 - Each evaluation criterion will be scored out of 5 and then be multiplied by the assigned weighting for the criterion. The weighted scores will be combined to determine the total weighted score out of 100.
- 5.6. **The following functionality evaluation criteria will apply for each category:**
- 5.6.1. **CATEGORY A - PROJECT MANAGEMENT CONSORTIUM**
(Projects with an estimated value from R0.00 up to R10million)

Criterion	Weighting
Previous experience of the company in similar Project Management in a Built Environment works: An appointment letters substantiating the number of projects carried out to a minimum value of R5 millions of similar projects in any of the following disciplines (Building, Roads, Stormwater, Environmental Management, Landfill site, Water and Sewer reticulations): The appointment letter must be signed on a client letterhead and letters may be verified. 25 points • More than 5 projects = 5 • 5 projects = 4 • 4 projects = 3 • 3 projects = 2 • 2 projects = 1 • Less than 2 projects = 0	25
Contactable references of similar nature of works (Building, Roads, Stormwater, Environmental Management, Landfill site, Water and Sewer reticulations):	

The Company must provide reference letters that relates to the projects as mentioned above on signed letterheads from previous and or current clients with contactable details. 15 Points • 5 letters or more = 5 • 4 letters = 4 • 3 letters = 3 • 2 letters = 1 • less than 2 letters provided = 0	15
Project Manager (Team Leader) experience: the person must have an NQF 7 qualification or higher in Project Management. Company must provide CV for the Project Manager (Team Leader) that will be responsible for the project and complete the details on schedule A: 15 points • NQF 7 qualification or higher, and 10 years' experience or more = 5 • NQF 7 qualification or higher, and 8 to 9 years' experience = 4 • NQF 7 qualification or higher, and 6 to 7 years' experience = 3 • NQF 7 qualification or higher, and 4 to 5 years' experience = 2 • NQF 7 qualification or higher, and 2 to 3 years' experience = 1 • NQF 7 qualification or higher, and less than 2 years = 0	15
Project Manager (Team Leader) must be registered with PMP (Project Management Professional). The company must provide a valid copy of the PMP (Project Management Professional) registration certificate of a Project Manager (Team leader) that will be responsible for the project (The validity of the certificate may be verified): 10 Points • Registered = 5 • Not submitted/Not registered = 0	10
Project Team Legal Adviser experience: the person must have a Law Degree (NQF 7 qualification or higher). The company must provide a copy of CV for the Project Team Legal Adviser that will be responsible for the project and complete schedule A (The validity of the certificate will be verified): 15 Points • NQF 7 qualification or higher, and 10 years' experience or more = 5 • NQF 7 qualification or higher, and 8 to 9 years' experience = 4 • NQF 7 qualification or higher, and 6 to 7 years' experience = 3 • NQF 7 qualification or higher, and 4 to 5 years' experience = 2 • NQF 7 qualification or higher, and 2 to 3 years' experience = 1 • NQF 7 qualification or higher, and less than 2 years = 0	15
Project Team Legal Adviser must be registered with LPC (Legal Practice Council). The company must provide a valid copy of the LPC (Legal Practice Council) registration certificate of a Project Team Legal Adviser that will be responsible for the project (The validity of the certificate may be verified): 10 Points • Registered = 5 • Not submitted/Not registered = 0	10
Financial standing / capability of the Company Provide the last 3 years' annual financial statements, refer to item (c) in Table 1 of the pre-compliance schedule. The ratio will be calculated as an average ratio calculation based on the information in the most recent 3-year annual financial statements, or if applicable from the date of establishment. If the input information for a ratio (i.e. either the numerator or denominator) is zero the outcome will be undefined, in such instance the "0" will be replaced with a "1" to calculate the ratio to avoid an undefined ratio outcome.: 10 points <u>Liquidity Ratios = (5)</u> Current Assets divided by Current Liability	10

If assets is greater than liabilities by - Above 2 = 5 - Above 1.5 but less than or equal to 2 = 4 - Above 1 but less than or equal to 1.5 = 3 - Less than or equal to 1 = 0 Interest Cover Ratio (5) Earnings before Interest and Taxes divided by Interest - Above 5 = 5 - Above 4 but less than or equal to 5 = 4 - Above 3 but less than or equal to 4 = 3 - Above 2 but less than or equal to 3 = 2 - Above 1 but less than or equal to 2 = 1 - Less than or equal to 1 = 0	
Total	100

NB! The minimum cut-off points for functionality evaluation are 70 calculated out of a total of 100 points, and any bidder scoring less than the minimum threshold will not qualify for further evaluation.

5.6.2. CATEGORY B - PROJECT MANAGEMENT CONSORTIUM
(Projects with an estimated value of R10million and above)

Criterion	Weighting
Previous experience of the company in similar Project Management in a Built Environment works: An appointment letters substantiating the number of projects carried out to a minimum value of R10 millions of similar projects in any of the following disciplines (Building, Roads, Stormwater, Environmental Management, Landfill site, Water and Sewer reticulations): The appointment letter must be signed on a client letterhead and letters may be verified. 25 points - More than 5 projects = 5 5 projects = 4 4 projects = 3 3 projects = 2 2 projects = 1 - Less than 2 projects = 0	25
Contactable references of similar nature of works (Building, Roads, Stormwater, Environmental Management, Landfill site, Water and Sewer reticulations): The Company must provide reference letters that relates to the projects as mentioned above on signed letterheads from previous and or current clients with contactable details. 15 Points 5 letters or more = 5 4 letters = 4 3 letters = 3 2 letters = 1 - less than 2 letters provided = 0	15
Project Manager (Team Leader) experience: the person must have a NQF level 7 or higher in Project Management. Company must provide CV for the Project Manager (Team Leader) that will be responsible for the project and complete the details on schedule A: 15 points - NQF 7 qualification or higher, and 10 years' experience or more = 5 - NQF 7 qualification or higher, and 8 to 9 years' experience = 4 - NQF 7 qualification or higher, and 6 to 7 years' experience = 3 - NQF 7 qualification or higher, and 4 to 5 years' experience = 2	15

• NQF 7 qualification or higher, and 2 to 3 years' experience = 1 • NQF 7 qualification or higher, and less than 2 years = 0	
Project Manager (Team Leader) must be registered with PMP (Project Management Professional). The company must provide a valid copy of the PMP (Project Management Professional) registration certificate of a Project Manager (Team leader) that will be responsible for the project (The validity of the certificate may be verified): 10 Points • Registered = 5 • Not submitted/Not registered = 0	10
Project Team Legal Adviser experience: the person must have a Law Degree (NQF 7 or higher). The company must provide a copy of CV for the Project Team Legal Adviser that will be responsible for the project and complete schedule A (The validity of the certificate will be verified): 15 Points • NQF 7 qualification or higher, and 10 years' experience or more = 5 • NQF 7 qualification or higher, and 8 to 9 years' experience = 4 • NQF 7 qualification or higher, and 6 to 7 years' experience = 3 • NQF 7 qualification or higher, and 4 to 5 years' experience = 2 • NQF 7 qualification or higher, and 2 to 3 years' experience = 1 • NQF 7 qualification or higher, and less than 2 years = 0	15
Project Team Legal Adviser must be registered with LPC (Legal Practice Council). The company must provide a valid copy of the LPC (Legal Practice Council) registration certificate of a Project Team Legal Adviser that will be responsible for the project (The validity of the certificate may be verified): 10 Points • Registered = 5 • Not submitted/Not registered = 0	10
Financial standing / capability of the Company Provide the last 3 years' annual financial statements, refer to item (c) in Table 1 of the pre-compliance schedule. The ratio will be calculated as an average ratio calculation based on the information in the most recent 3-year annual financial statements, or if applicable from the date of establishment. If the input information for a ratio (i.e. either the numerator or denominator) is zero the outcome will be undefined, in such instance the "0" will be replaced with a "1" to calculate the ratio to avoid an undefined ratio outcome.: 10 points <u>Liquidity Ratios = (5)</u> Current Assets divided by Current Liability If assets are greater than liabilities by • Above 2 = 5 • Above 1.5 but less than or equal to 2 = 4 • Above 1 but less than or equal to 1.5 = 3 • Less than or equal to 1 = 0 <u>Interest Cover Ratio (5)</u> Earnings before Interest and Taxes divided by Interest • Above 5 = 5 • Above 4 but less than or equal to 5 = 4 • Above 3 but less than or equal to 4 = 3 • Above 2 but less than or equal to 3 = 2 • Above 1 but less than or equal to 2 = 1 • Less than or equal to 1 = 0	10
Total	100

NB! The minimum cut-off points for functionality evaluation are 70 calculated out of a total of 100 points, and any bidder scoring less than the minimum threshold will not qualify for further evaluation.

5.6.3. CATEGORY C - ENGINEERING SERVICES

(Minor infrastructure projects including depots, garden sites, and buyback center, with project value from R 0.00 million to R 50 million)

Criterion	Weighting
Previous experience of the company in similar Project Management in a Built Environment works: An appointment letters substantiating the number of projects carried out to a minimum value of R10 millions of similar projects in any of the following disciplines (Building, Roads, Stormwater, Environmental Management, Landfill site, Water and Sewer reticulations): The appointment letter must be signed on a client letterhead and letters may be verified. 25 points • More than 5 projects = 5 • 5 projects = 4 • 4 projects = 3 • 3 projects = 2 • 2 projects = 1 • Less than 2 projects = 0	25
Contactable references of similar nature of works (Building, Roads, Stormwater, Environmental Management, Landfill site, Water and Sewer reticulations): The Company must provide reference letters that relates to the projects as mentioned above on signed letterheads from previous and or current clients with contactable details. 15 Points • 5 letters or more = 5 • 4 letters = 4 • 3 letters = 3 • 2 letters = 1 • less than 2 letters provided = 0	15
Project Manager experience: the person must have a NQF 7/higher in Civil Engineering. Company must provide CV for the Project Manager (Team Leader) that will be responsible for the project and complete the details on schedule A: 15 points • NQF 7 qualification or higher, and 10 years' experience or more = 5 • NQF 7 qualification or higher, and 8 to 9 years' experience = 4 • NQF 7 qualification or higher, and 6 to 7 years' experience = 3 • NQF 7 qualification or higher, and 4 to 5 years' experience = 2 • NQF 7 qualification or higher, and 2 to 3 years' experience = 1 • NQF 7 qualification or higher, and less than 2 years = 0	15
Project Manager must be registered with ECSA (Engineering Council of South Africa). The company must provide a valid copy of the ECSA (Engineering Council of South Africa) registration certificate of a Project Manager that will be responsible for the project (The validity of the certificate maybe verified): 10 Points • Registered = 5 • Not submitted/Not registered = 0	10
Resident Engineer experience: the person must have a NQF 7 qualification or higher in Civil Engineering. The company must provide a copy of CV for the Resident Engineer that will be responsible for the project and complete schedule A (The validity of the certificate maybe verified): 15 Points • NQF 7 qualification or higher, and 10 years' experience or more = 5	15

• NQF 7 qualification or higher, and 8 to 9 years' experience = 4 • NQF 7 qualification or higher, and 6 to 7 years' experience = 3 • NQF 7 qualification or higher, and 4 to 5 years' experience = 2 • NQF 7 qualification or higher, and 2 to 3 years' experience = 1 • NQF 7 qualification or higher, and less than 2 years = 0	
Resident Engineer must be registered with ECSA (Engineering Council of South Africa). The company must provide a valid copy of the ECSA (Engineering Council of South Africa) registration certificate of a Resident Engineer that will be responsible for the project: 10 Points • Registered = 5 • Not submitted/Not registered = 0	10
Financial standing / capability of the Company Provide the last 3 years' annual financial statements, refer to item (c) in Table 1 of the pre-compliance schedule. The ratio will be calculated as an average ratio calculation based on the information in the most recent 3-year annual financial statements, or if applicable from the date of establishment. If the input information for a ratio (i.e. either the numerator or denominator) is zero the outcome will be undefined, in such instance the "0" will be replaced with a "1" to calculate the ratio to avoid an undefined ratio outcome.: 10 points <u>Liquidity Ratios = (5)</u> Current Assets divided by Current Liability If assets is greater than liabilities by • Above 2 = 5 • Above 1.5 but less than or equal to 2 = 4 • Above 1 but less than or equal to 1.5 = 3 • Less than or equal to 1 = 0 <u>Interest Cover Ratio (5)</u> Earnings before Interest and Taxes divided by Interest • Above 5 = 5 • Above 4 but less than or equal to 5 = 4 • Above 3 but less than or equal to 4 = 3 • Above 2 but less than or equal to 3 = 2 • Above 1 but less than or equal to 2 = 1 • Less than or equal to 1 = 0	10
Total	100

NB! The minimum cut-off points for functionality evaluation are 70 calculated out of a total of 100 points, and any bidder scoring less than the minimum threshold will not qualify for further evaluation.

5.6.4. **CATEGORY D - SPECIALIST STUDIES** (including noise impact study, traffic study, air quality impact, stormwater management plan, eecology & risk study, with project value from R 1.00 – R 5 million)

Criterion	Weighting
Previous experience of the company in Special Studies in a Built Environment works An appointment letters substantiating the number of projects carried out to value of at least R1millions of similar projects in any of the following disciplines (Feasibility Studies, Professional Environmental Management and Environmental Assessment Specialist). The appointment letter must be signed on a client letterhead and letters may be verified. 25 points • More than 5 projects = 5 • 5 projects = 4	25

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• 4 projects = 3 • 3 projects = 2 • 2 projects = 1 • Less than 2 projects = 0	
Contactable references letter of similar nature of works (Feasibility Studies, Professional Environmental Management and Environmental Assessment Specialist): The Company must provide reference letters that relates to the projects as mentioned above on signed letterheads from previous and or current clients with contactable details. 15 Points • 5 letters or more = 5 • 4 letters = 4 • 3 letters = 3 • 2 letters = 1 • less than 2 letters provided = 0	15
Environmental Specialist experience: the person must have a NQF 7 qualification or higher in Environmental Management. Company must provide CV for the Environmental Specialist that will be responsible for the project and complete the details on schedule A: 15 points • NQF 7 qualification or higher, and 10 years' experience or more = 5 • NQF 7 qualification or higher, and 8 to 9 years' experience = 4 • NQF 7 qualification or higher, and 6 to 7 years' experience = 3 • NQF 7 qualification or higher, and 4 to 5 years' experience = 2 • NQF 7 qualification or higher, and 2 to 3 years' experience = 1 • NQF 7 qualification or higher, and less than 2 years = 0	15
Environmental Specialist must be registered with (SACNASP/EAPASA)-South African Council for Natural Scientist Professions/Environmental assessment practitioners association of South Africa. The company must provide a valid copy of SACNASP/EAPASA registration certificate of an Environmental Specialist that will be responsible for the project (The validity of the certificate maybe verified): 10 Points • Registered = 5 • Not submitted/Not registered = 0	10
Feasibility Study Team Leader experience: the person must have a Degree (NQF 7 qualification or higher) in Civil Engineering. The company must provide a copy of CV for the Feasibility Study Team Leader that will be responsible for the project and complete schedule A (The validity of the certificate maybe verified): 15 Points • NQF 7 qualification or higher, and 10 years' experience or more = 5 • NQF 7 qualification or higher, and 8 to 9 years' experience = 4 • NQF 7 qualification or higher, and 6 to 7 years' experience = 3 • NQF 7 qualification or higher, and 4 to 5 years' experience = 2 • NQF 7 qualification or higher, and 2 to 3 years' experience = 1 • NQF 7 qualification or higher, and less than 2 years = 0	15
Feasibility Study Team Leader must be registered with ECSA (Engineering Council of South Africa). The company must provide a valid copy of the ECSA (Engineering Council of South Africa) registration certificate of a Feasibility Study Team Leader that will be responsible for the project: 10 Points • Registered = 5 • Not submitted/Not registered = 0	10

Financial standing / capability of the Company Provide the last 3 years' annual financial statements, refer to item (c) in Table 1 of the pre-compliance schedule. The ratio will be calculated as an average ratio calculation based on the information in the most recent 3-year annual financial statements, or if applicable from the date of establishment. If the input information for a ratio (i.e. either the numerator or denominator) is zero the outcome will be undefined, in such instance the "0" will be replaced with a "1" to calculate the ratio to avoid an undefined ratio outcome.: 10 points <u>Liquidity Ratios = (5)</u> Current Assets divided by Current Liability If assets is greater than liabilities by • Above 2 = 5 • Above 1.5 but less than or equal to 2 = 4 • Above 1 but less than or equal to 1.5 = 3 • Less than or equal to 1 = 0 <u>Interest Cover Ratio (5)</u> Earnings before Interest and Taxes divided by Interest • Above 5 = 5 • Above 4 but less than or equal to 5 = 4 • Above 3 but less than or equal to 4 = 3 • Above 2 but less than or equal to 3 = 2 • Above 1 but less than or equal to 2 = 1 • Less than or equal to 1 = 0	10
Total	100

NB! The minimum cut-off points for functionality evaluation are 70 calculated out of a total of 100 points, and any bidder scoring less than the minimum threshold will not qualify for further evaluation.

5.6.5. CATEGORY E - LAND SURVEYOR
(Project value from R 1.00 to R 5 million)

Criterion	Weighting
Previous experience of the company in Land Survey in a Built Environment works An appointment letters substantiating the number of projects carried out to value of at least R 500 000,00 of similar projects in Land Survey. The appointment letter must be signed on a client letterhead and letters may be verified. 25 points • More than 5 projects = 5 • 5 projects = 4 • 4 projects = 3 • 3 projects = 2 • 2 projects = 1 • Less than 2 projects = 0	25
Contactable references letter of similar nature of works in Land survey: The Company must provide reference letters that relates to the projects as mentioned above on signed letterheads from previous and or current clients with contactable details. 15 Points • 5 letters or more = 5 • 4 letters = 4 • 3 letters = 3 • 2 letters = 1 • less than 2 letters provided = 0	15

Land surveyor experience: the person must have an NQF 7 qualification or higher in Land Surveying. Company must provide CV for the Environmental Management that will be responsible for the project and complete the details on schedule A: 15 points • NQF 7 qualification or higher, and 10 years' experience or more = 5 • NQF 7 qualification or higher, and 8 to 9 years' experience = 4 • NQF 7 qualification or higher, and 6 to 7 years' experience = 3 • NQF 7 qualification or higher, and 4 to 5 years' experience = 2 • NQF 7 qualification or higher, and 2 to 3 years' experience = 1 • NQF 7 qualification or higher, and less than 2 years = 0	15
Land Surveyor must be registered with (SAGC)-South African Geomatics Council. The company must provide a valid copy of SAGC registration certificate of an Land Surveyor that will be responsible for the project (The validity of the certificate maybe verified): 10 Points • Registered = 5 • Not submitted/Not registered = 0	10
Assistant Land surveyor experience: the person must have a NQF 7/higher in Land Surveying. Company must provide CV for the Environmental Management that will be responsible for the project and complete the details on schedule A: 15 points • NQF 7 qualification or higher, and 7 years' experience or more = 5 • NQF 7 qualification or higher, and 5 to 6 years' experience = 4 • NQF 7 qualification or higher, and 4 years' experience = 3 • NQF 7 qualification or higher, and 3 years' experience = 2 • NQF 7 qualification or higher, and 2 years' experience = 1 • NQF 7 qualification or higher, and less than 2 years' experience = 0	15
Assistant Land Surveyor must be registered with (SAGC)-South African Geomatics Council. The company must provide a valid copy of SAGC registration certificate of a Land Surveyor that will be responsible for the project (The validity of the certificate maybe verified): 10 Points • Registered = 5 • Not submitted/Not registered = 0	10
Financial standing / capability of the Company Provide the last 3 years' annual financial statements, refer to item (c) in Table 1 of the pre-compliance schedule. The ratio will be calculated as an average ratio calculation based on the information in the most recent 3-year annual financial statements, or if applicable from the date of establishment. If the input information for a ratio (i.e. either the numerator or denominator) is zero the outcome will be undefined, in such instance the "0" will be replaced with a "1" to calculate the ratio to avoid an undefined ratio outcome.: 10 points <u>Liquidity Ratios = (5)</u> Current Assets divided by Current Liability If assets is greater than liabilities by • Above 2 = 5 • Above 1.5 but less than or equal to 2 = 4 • Above 1 but less than or equal to 1.5 = 3 • Less than or equal to 1 = 0 <u>Interest Cover Ratio (5)</u> Earnings before Interest and Taxes divided by Interest • Above 5 = 5 • Above 4 but less than or equal to 5 = 4 • Above 3 but less than or equal to 4 = 3 • Above 2 but less than or equal to 3 = 2	10

• Above 1 but less than or equal to 2 = 1 • Less than or equal to 1 = 0	
Total	100

NB! The minimum cut-off points for functionality evaluation are 70 calculated out of a total of 100 points, and any bidder scoring less than the minimum threshold will not qualify for further evaluation.

5.6.6. CATEGORY F-TOWN PLANNING (with project value from R 1.00 – R 5 million)

Criterion	Weighting
Previous experience of the company in similar Town Planning project in government works: An appointment letters substantiating the number of projects carried out to the value of at least R150 000,00 of similar projects in the following (Zoning, Rezoning, sub-division, Consolidation, and registration of the land with surveyor general office): The appointment letter must be signed on a client letterhead and letters may be verified. 25 points • More than 5 projects = 5 • 5 projects = 4 • 4 projects = 3 • 3 projects = 2 • 2 projects = 1 • Less than 2 projects = 0	25
Contactable references of similar nature of works (Zoning, Rezoning, sub-division, Consolidation, or registration of the land with surveyor general office): The Company must provide reference letters that relates to the projects as mentioned above on signed letterheads from previous and or current clients with contactable details. 15 Points • 5 letters or more = 5 • 4 letters = 4 • 3 letters = 3 • 2 letters = 1 • less than 2 letters provided = 0	15
Lead Town Planner's experience: the person must have a NQF level 7 or higher in Town Planning. Company must provide CV for the Lead Town Planner that will be responsible for the project and complete the details on schedule A: 15 points • NQF 7 qualification or higher, and 10 years' experience or more = 5 • NQF 7 qualification or higher, and 8 to 9 years' experience = 4 • NQF 7 qualification or higher, and 6 to 7 years' experience = 3 • NQF 7 qualification or higher, and 4 to 5 years' experience = 2 • NQF 7 qualification or higher, and 2 to 3 years' experience = 1 • NQF 7 qualification or higher, and less than 2 years' experience = 0	15
Lead Town Planner must be registered with SACPLAN (South African Council for Planners). The company must provide a valid copy of the SACPLAN (South African Council for Planners) registration certificate of a Lead Town Planner that will be responsible for the project (The validity of the certificate may be verified): 10 Points • Registered = 5 • Not submitted/Not registered = 0	10
Assistant Town Planner experience: the person must have a NQF level 7 or higher. The company must provide a copy of CV for the Assistant Town Planner that will be responsible for the project and complete schedule A (The validity of the certificate will	

be verified): 15 Points - NQF 7 qualification or higher, and 7 years' experience or more = 5 - NQF 7 qualification or higher, and 5 to 6 years' experience = 4 - NQF 7 qualification or higher, and 4 years' experience = 3 - NQF 7 qualification or higher, and 3 years' experience = 2 - NQF 7 qualification or higher, and 2 years' experience = 1 - NQF 7 qualification or higher, and less than 2 years' experience = 0	15
Assistant Town Planner must be registered with SACPLAN (South African Council for Planners). The company must provide a valid copy of the SACPLAN (South African Council for Planners) registration certificate of an Assistant Town Planner that will be responsible for the project (The validity of the certificate may be verified): 10 Points - Registered = 5 - Not submitted/Not registered = 0	10
Financial standing / capability of the Company Provide the last 3 years' annual financial statements, refer to item (c) in Table 1 of the pre-compliance schedule. The ratio will be calculated as an average ratio calculation based on the information in the most recent 3-year annual financial statements, or if applicable from the date of establishment. If the input information for a ratio (i.e. either the numerator or denominator) is zero the outcome will be undefined, in such instance the "0" will be replaced with a "1" to calculate the ratio to avoid an undefined ratio outcome.: 10 points Liquidity Ratios = (5) Current Assets divided by Current Liability If assets is greater than liabilities by - Above 2 = 5 - Above 1.5 but less than or equal to 2 = 4 - Above 1 but less than or equal to 1.5 = 3 - Less than or equal to 1 = 0 Interest Cover Ratio (5) Earnings before Interest and Taxes divided by Interest - Above 5 = 5 - Above 4 but less than or equal to 5 = 4 - Above 3 but less than or equal to 4 = 3 - Above 2 but less than or equal to 3 = 2 - Above 1 but less than or equal to 2 = 1 - Less than or equal to 1 = 0	10
Total	100

NB! The minimum cut-off points for functionality evaluation are 70 calculated out of a total of 100 points, and any bidder scoring less than the minimum threshold will not qualify for further evaluation.

- 5.7. The minimum threshold for functionality evaluation is 70 out of a 100, for each of the respective categories. Any bidder that score below the threshold will not be further considered for the particular category.
- 5.8. Bidders that meet the minimum functionality threshold for each category will be ranked based on the functionality evaluation score from the highest to the lowest score in descending order for each category. The highest scoring bidders for each category will be selected to be included on the panel of pre-approved service providers.

6. OBJECTIVE CRITERIA FOR SELECTING THE PANEL OF PRE-APPROVED SERVICE PROVIDERS

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- 6.1. The highest scoring bidders for each category based on functionality evaluation scores will be recommended to be included on the panel of pre-approved service providers.
- 6.2. The number of bidders will be limited to the maximum number of 30 service providers in total as indicated in the tender document.
- 6.3. Bidders who applied for multiple categories and qualify for the respective categories based on the evaluation criteria specified in the tender document may be appointed for multiple categories.
- 6.4. The Bid Evaluation Committee will short list each category respectively, and the maximum number of bidders that will be included on the panel of pre-approved service providers for each category will be as follows:
 - Category A – maximum of 4 bidders
 - Category B - maximum of 4 bidders
 - Category C - maximum of 10 bidders
 - Category D - maximum of 4 bidders
 - Category E - maximum of 4 bidders
 - Category F - maximum of 4 bidders
- 6.5. The Bid Evaluation Committee will shortlist a maximum of 30 bids across all categories based on the outcome of the evaluation process.
- 6.6. As part of the due diligence process, information submitted in the respective bids may be verified prior to final award. Where it is found that information submitted in a bid response could not be verified, the bid may be disqualified or evaluation points allocated based on information provided may be amended accordingly.

7. CRITERIA FOR BREAKING DEADLOCK IN SCORING IN THE CASE OF RANKING POINTS BEING EQUAL

- 7.1. If two or more bidders score an equal total number of points, locality within the City of Johannesburg area will get preference to determine the deadlock.
- 7.2. If two or more bidders still have equal points, the bidder with the highest percentage woman ownership will get preference to determine the deadlock,
- 7.3. If two or more bidders still have equal points, the bidder with the highest percentage black ownership will get preference to determine the deadlock,
- 7.4. If two or more bidders still have equal points, the bidder will be decided by drawing of lots.

8. RECOMMENDATION AND AWARD OF PANEL OF SERVICE PROVIDERS

- 8.1. The Bid Evaluation Committee will short list each category respectively up to a maximum of 30 bids in total based on the outcome of the evaluation process and make recommendations to the Bid Adjudication Committee. After consideration, the Bid Adjudication Committee will make a further recommendation to the Managing Director for final consideration and resolution.

9. SECOND STAGE EVALUATION

9.1. The following evaluation criteria will apply during the second stage of the process.

10. PRICE AND PREFERENCE POINTS EVALUATION CRITERIA THAT WILL BE APPLIED TO PROPOSAL / QUOTATIONS SOURCED FROM THE PANEL OF PRE-APPROVED SERVICE PROVIDERS

- 10.1. During the second stage, qualifying bidders that were included on the panel will be invited to provide quotations for specific work packages. Bidders will be further evaluated during that stage on price and preference.
- 10.2. The bidder shall give the total all-inclusive prices in South African Rand, inclusive of all taxes and discounts in the pricing schedule. The total bid price will be recorded at tender closing date in the Pikitup Tender Register. Where conflicts exist between the price quoted in the pricing schedule and the other prices quoted by the bidder elsewhere, the price quoted in the pricing schedule shall prevail. Where applicable, the bidder must provide a price breakdown.
- 10.3. Final Proposal will be evaluated in terms of the Pikitup Supply Chain Management Policy by either the 80/20 or 90/10 preference point system. The 80/20 preference point system is applicable to price quotations and tenders with a Rand value up to R50 million (all applicable taxes included). The 90/10 preference point system is applicable to bids with a Rand value above R50 million (all applicable taxes included).
- 10.4. If there is uncertainty on the preference point system to be applied, the tender will be evaluated on either the 80/20 or 90/10 preference point system. Once a tender is received, the lowest acceptable tender will be used to determine the preference point system to be used for the evaluation of tenders.
- Where the lowest acceptable tender is below R50 million, the 80/20 preference point system must be used.
 - If the lowest acceptable tender is above R50 million, the 90/10 preference point system must be used.
- 10.5. A maximum number of 20 or 10 preference points may be allocated to a bidder, depending on the contract value by achieving the specified goals stipulated in the invitation to bid document. The maximum preference points that may be claimed for each specific goal is indicated in the tender document.
- 10.6. Where a two-stage procurement process is utilised, the 80/20 or 90/10 price and preference point system may apply in the second stage of the tender process.
- 10.7. The price submitted by the lowest acceptable bidder will be used in the formula below as the basis (Pmin) when calculating the points for price. The bidder who scored the highest points for price, will score either 80 or 90 points, while other bidders will score lower points out of 80 or 90 on a pro-rata basis.
- 10.8. The 80/20 or 90/10 Preference Point Systems will be calculated as indicated in the section below.
- 10.9. A maximum of 80 or 90 points is allocated for price on the following basis:

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

Where

- Ps = Points scored for comparative price of bid under consideration
Pt = Comparative price of bid under consideration
Pmin = Comparative price of lowest acceptable bid

- 10.10. Should, during any stage of the evaluation and / or adjudication process, it becomes evident that the bidder who scored the highest number of points is an unacceptable or non-responsive bidder and this bidder also scored the highest points for price, the price and preference points scored by each bidder will be recalculated using the new lowest acceptable bidder's price as the basis (Pmin) for calculation purposes.

11. PREFERENCE POINTS TO BE AWARDED FOR SPECIFIC GOALS

- 11.1. At evaluation of quotations from the panel of pre-approved service providers, preference points will be awarded for specific goals. The bidder will be allocated points based on the goals stated in the table below as may be supported by documented proof as stated in the invitation for quotation.
- 11.2. Preference points will be awarded for specific goals as stated in the RFQ invitation. Where it is unclear whether the 80/20 or 90/10 preference point system applies the lowest acceptable bid price will be used to determine the applicable preference point system.
- 11.3. The respective price and preference formulas, as well as the specific goals for which preference points may be claimed are outlined in the Price and Preference claim form (i.e. MBD 6.1 document).
- 11.4. For example, the following specific goals are determined by Pikitup with the intent to promote historical disadvantaged individuals (HDI) and the local economy.

Table: Specific goals for preference points

Specific goals	The specific goals points allocated by Pikitup for this tender	Means of verification	Points allocated for each goal (80/20 preference point system)	Points allocated for each goal (90/10 preference point system)
Goal 1	Enterprises owned by black people with at least 51% shareholding	CSD, Valid BBBEE certificate, Affidavit sworn under oath, copy of owners ID, or shareholders certificate	5	2.5
	Enterprise owned by women with at least 51% shareholding	CSD, Valid BBBEE certificate, Affidavit sworn under oath, copy of owners ID, or shareholders certificate	5	2.5
	Enterprise owned by youth with at least 51% shareholding	CSD, Valid BBBEE certificate, Affidavit sworn under oath, copy of owners ID, or shareholders certificate	Not applicable	Not applicable
	Enterprise owned by people with disabilities with at least 51% shareholding	CSD, Valid BBBEE certificate, Affidavit sworn under oath, or shareholders certificate	Not applicable	Not applicable
	Co-operatives or Non-Profit Organisations which is at least 51% owned by black people	CSD, Valid BBBEE certificate, Affidavit sworn under oath, copy of owners ID, or CIPC registration document	Not applicable	Not applicable
Goal 2	SMME's (An EME or QSE)	CSD, Valid BBBEE certificate, Affidavit sworn under oath	5	2.5
	Enterprises located within the City of Johannesburg Metropolitan Municipality	MBD 1 document, CSD certificate, bidding company municipal account statement, letter or statement from the landlord confirming company address	5	2.5
	Enterprises located within a specific region within the CoJ for work to be done or services to be rendered in that region.	MBD 1 document, CSD, proof of municipal account, letter or statement from the landlord, letter from the Ward Council confirming the business address	Not applicable	Not applicable
	Enterprises located in Townships	MBD 1 document, CSD, proof of municipal account, letter or statement from the landlord, letter from the Ward Council confirming the business address	Not applicable	Not applicable
	Subcontracting to business owned by designated groups (up to 30%)	Commitment letter confirming subcontracting the designated groups, draft subcontracting agreement to the designated groups and Valid BBBEE certificate or Affidavit sworn under oath of the subcontracted business	Not applicable	Not applicable
Total (Maximum number of preference points)			20	10

- 11.5. The bidder who scores the highest points for price and preference for the specific work package will be recommended for award, unless objective criteria is applied and determines differently.

12. CRITERIA FOR BREAKING A DEADLOCK IN SCORING

- 12.1. In the event that two or more tenderers have scored equal total points, the successful tenderer must be the one that scored the highest points for specific goals.
- 12.2. If two or more tenderers are still equal in all respects, including equal preference points for specific goals, the successful tenderer must be the one scoring the highest score for functionality, if functionality is part of the evaluation process.
- 12.3. In the event that two or more tenderers are still equal in all respects, the award must be decided by the drawing of lots.

13. OBJECTIVE CRITERIA THAT WILL APPLY FOR WORK OR PROJECT ALLOCATION AGAINST THE PANEL OF APPOINTED CONSULTANTS

- 13.1. Specific work packages will be awarded to consultants during the 36-month validity of the panel on an as and when required basis as projects are identified.

- 13.2. The highest scoring bidder based on price and preference will get first preference for work allocation against the panel.
- 13.3. Consultants will be appointed on fees based on an estimated construction cost and once the actual construction cost is determined, the final fees will be adjusted accordingly.
- 13.4. In cases where consultant is allocated the time base project, applicable fees will be in line with the current Department of Public Works and Infrastructure Gazetted rates.
- 13.5. Where a consultant was already awarded two active projects, the consultant will not be awarded further projects until at least one of the two allocated active projects are concluded or completed.
- 13.6. In the case where a project has been paused or cancelled by Pikitup, the Consultant will be considered for further awards.

ANNEXURE 3.1

MBD 3.1

IMPORTANT NOTE:

NO PRICING SCHEDULE IS APPLICABLE AT THIS STAGE OF THE PROCESS

ANNEXURE 4

MBD 4

DECLARATION OF INTEREST

MBD 4

DECLARATION OF INTEREST

1. No bid will be accepted from persons in the service of the state¹.
2. Any person, having a kinship with persons in the service of the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid. In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons connected with or related to persons in service of the state, it is required that the bidder or their authorised representative declare their position in relation to the evaluating/adjudicating authority.
3. **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**

3.1 Full Name of bidder or his or her representative:

3.2 Identity Number:

3.3 Position occupied in the Company (director, trustee, shareholder²):

3.4 Company Registration Number:

3.5 Tax Reference Number:

3.6 VAT Registration Number:

3.7 The names of all directors / trustees / shareholders members, their individual identity numbers and state employee numbers must be indicated in paragraph 4 below.

3.8 Are you presently in the service of the state?
(Circle the applicable answer) YES / NO

3.8.1 If yes, furnish particulars.
.....

¹MSCM Regulations: "in the service of the state" means to be –

- (a) a member of –
 - (i) any municipal council;
 - (ii) any provincial legislature; or
 - (iii) the national Assembly or the national Council of provinces;
- (b) a member of the board of directors of any municipal entity;
- (c) an official of any municipality or municipal entity;
- (d) an employee of 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);
- (e) a member of the accounting authority of any national or provincial public entity; or
- (f) an employee of Parliament or a provincial legislature.

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

3.9 Have you been in the service of the state for the past twelve months?
(Circle the applicable answer)...YES / NO

3.9.1 If yes, furnish particulars.....
.....

3.10 Do you have any relationship (family, friend, other) with persons in the service of the state and who may be involved with the evaluation and or adjudication of this bid?

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(Circle the applicable answer) YES / NO

3.10.1 If yes, furnish particulars.

.....
.....

3.11 Are you, aware of any relationship (family, friend, other) between any other bidder and any persons in the service of the state who may be involved with the evaluation and or adjudication of this bid?

(Circle the applicable answer)...YES / NO

3.11.1 If yes, furnish particulars.

.....
.....

3.12 Are any of the company's directors, trustees, managers, principle shareholders or stakeholders in service of the state?

(Circle the applicable answer)...YES / NO

3.12.1 If yes, furnish particulars.

.....
.....

3.13 Are any spouse, child or parent of the company's directors, trustees, managers, principle shareholders or stakeholders in service of the state?

(Circle the applicable answer)...YES / NO

3.13.1 If yes, furnish particulars.

.....
.....

3.14 Do you or any of the directors, trustees, managers, principle shareholders, or stakeholders of this company have any interest in any other related companies or business whether or not they are bidding for this contract?

(Circle the applicable answer)...YES / NO

3.14.1 If yes, furnish particulars:

.....
.....

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

Full Name	Identity Number	State Employee Number

.....
Signature

.....
Date

.....
Capacity

.....
Name of Bidder

ANNEXURE 5.1

MBD 5

DECLARATION FOR PROCUREMENT ABOVE R10 MILLION

MBD 5

DECLARATION FOR PROCUREMENT ABOVE R10 MILLION (ALL APPLICABLE TAXES INCLUDED)

For all procurement expected to exceed R10 million (all applicable taxes included), bidders must complete the following questionnaire:

- 1 Are you by law required to prepare annual financial statements for auditing?
 - 1.1 If yes, submit audited annual financial statements (signed and / or stamped by the relevant auditor) for the past three years or since the date of establishment if established during the past three years.

YES / NO *
(* Delete if not applicable)
 - 1.2 If no, please complete the public interest scores (PIS) for each of the financial years for which you provided financial statements, to determine if the statements required to be independently reviewed or not.
- 2 Do you have any outstanding undisputed commitments for municipal services towards any municipality for more than three months or any other service provider in respect of which payment is overdue for more than 30 days?

YES / NO *
(* Delete if not applicable)

 - 2.1 If no, this serves to certify that the bidder has no undisputed commitments for municipal services towards any municipality for more than three months or other service provider in respect of which payment is overdue for more than 30 days.
 - 2.2 If yes, provide particulars.
.....
.....
- 3 Has any contract been awarded to you by an organ of state during the past five years, including particulars of any material non-compliance or dispute concerning the execution of such contract?

YES / NO *
(* Delete if not applicable)

 - 3.1 If yes, furnish particulars.

4. Will any portion of goods or services be sourced from outside the Republic, and, if so, what portion and whether any portion of payment from the municipality / municipal entity is expected to be transferred out of the Republic?

YES / NO *
(* Delete if not applicable)

4.1 If yes, furnish particulars

.....
.....

CERTIFICATION

**I, THE UNDERSIGNED (NAME)
CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM
IS CORRECT.**

**I ACCEPT THAT THE STATE MAY ACT AGAINST ME SHOULD THIS
DECLARATION PROVE TO BE FALSE.**

.....
Signature

.....
Date

.....
Position

.....
Name of Bidder

ANNEXURE 5.2

PIS SCORE

DECLARATION OF PUBLIC INTEREST SCORE (PIS) SCORE

Further to MBD 5 Question 1; where it was declared that your company is not required by law to prepare annual financial statements for auditing, please declare your company's PIS score below:

PIS SCORE FOR EACH SET OF ANNUAL FINANCIAL STATEMENTS (AS REQUIRED BY THE COMPANIES ACT OF 2008)

Latest set of annual financial statements, public interest score (PIS) :

Previous set of annual financial statements, public interest score (PIS) :

Prior set of annual financial statements, public interest score (PIS) :

Indicate which Financial Statement classification apply to your company	PIS Score	Latest set of financial statements Tick relevant box below with an "X"	Previous set of financial statements Tick relevant box below with an "X"	Prior set of financial statements Tick relevant box below with an "X"
- Annual Financial Statement submitted <u>must be audited</u> (Where the bidder did not provide a PIS score or if the PIS score provided is 350 points and above; audited financial statements must be provided)	Above 350			
- Annual Financial Statement submitted <u>must have an independent review</u> (Where the bidder's PIS score is between 100 and 350; financial statements that are independent reviewed by a registered auditor or a chartered accountant must be provided)	Between 100 and 350			
- Annual Financial Statement submitted <u>do not require to be audited neither independent reviewed</u> (Where the bidder's PIS score is below 100, financial statements must be submitted but don't have to be audited or independently reviewed)	Below 100			

IMPORTANT NOTE:

BIDDERS WHO DO NOT PROVIDE AUDITED ANNUAL FINANCIAL STATEMENTS MUST PROVIDE A PUBLIC INTEREST SCORE (PIS) TO CONFIRM IF THE BIDDER SHOULD PROVIDE INDEPENDENTLY REVIEWED FINANCIAL STATEMENTS OR NOT. NON-COMPLIANCE TO THE AFOREMENTIONED WILL RESULT INTO DISQUALIFICATION FOR FURTHER EVALUATION.

CERTIFICATION

I, THE UNDERSIGNED (NAME)

CERTIFY THAT THE PIS SCORE ABOVE IS CORRECT.

PIKITUP MAY REQUEST FOR SUPPORTING DOCUMENTS TO CONFIRM THE ABOVE SCORE.

I ACCEPT THAT THE STATE MAY ACT AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.

Signature

Date

Position

Bidder Name

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THE FOLLOWING INFORMATION IS PROVIDED BY PIKITUP FOR THE BIDDER'S INFORMATION ONLY AND THE INFORMATION MIGHT ASSIST THE BIDDERS RELATING TO THE COMPANIES AND INTELLECTUAL PROPERTY COMMISSION REQUIREMENTS IN TERMS OF THE FINANCIAL STATEMENT REQUIREMENTS OF THE COMPANIES ACT (2008) AND THE CLOSED CORPORATIONS ACT (1984).

Financial Statements and Independent Reviews

Private or personal liability companies that are required to be audited by the Companies Act, 2008 or regulation 28, must file a copy of the latest approved Audited Financial Statements on the date that they file their annual return with the CIPC.

The following private companies are required to have their annual financial statements audited:

- Any private or personal liability company if, in the ordinary course of its primary activities, it holds assets in a fiduciary capacity for persons who are not related to the company, and the aggregate value of such assets held at any time during the financial year exceeds R5 million;
- Any private or personal liability company that compiles its financial statements internally (for example, by its financial director or one of the owners) and that has a Public Interest Score (PIS) of 100 or more;
- Any private or personal liability company that has its financial statements compiled by an independent party (such as an external accountant) and that has a Public Interest Score (PIS) of 350 or more;

Unless the company has opted to have its annual financial statements audited or is required by its Memorandum of Incorporation (MOI) to do so, a private or personal liability company that is not managed by its owners may be subject to independent review if:

- It compiles its financial statements internally and its Public Interest Score is less than 100;
- It has its financial statements compiled independently at its Public Interest Score is between 100 and 349;

Private or personal liability companies that are not required to have their financial statements audited, may elect to voluntarily file their audited or reviewed statements with their annual returns. If such companies choose not to file a full set of financial statements, they must file a financial accountability supplement with their annual return.

How to calculate the Public Interest Score (PIS) of a company or close corporation

- a number of points equal to the average number of employees of the company during the financial year;
- one point for every R1 million (or portion thereof) in third party liability of the company, at the financial year end;
- one point for every R1 million (or portion thereof) in turnover during the financial year; and
- one point for every individual who, at the end of the financial year, is known by the company-
- in the case of a profit company, to directly or indirectly have a beneficial interest in any of the company's issued securities; or
- in the case of a non-profit company, to be a member of the company, or a member of an association that is a member of the company.

Source Companies and Intellectual Property Commission website: <http://www.cipc.co.za>

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Does your CC follow the CC Act or the Companies Act?

If you're not 100% compliant with legislation for accounting officer duties, you'll face penalties. When the Companies Act (2008) came into effect, the Closed Corporations Act (1984) didn't fall away. The Companies Act didn't replace it either, thus both Acts apply.

According to the Close Corporations Act, you don't need an audit. You can use general accounting principles. For companies, you have to follow IFRS and the Companies Act. But if your CC grows the Companies Act kicks in and a full audit and IFRS or IFRS for SMEs is required.

Source: FSP Business Website: <http://fspbusiness.co.za/articles/accounting/do-you-know-when-and-why-you-need-to-create-financial-statements-7151.html>

Do you know when and why you need to create financial statements?

Here's what to do to calculate your PIS score:

The company gets 1 point for every:

- Number of shareholders and / or partners; and
 - Average number of staff members over the entire year (You need to look at the average of all the staff members for the entire year. So, if you have a high staff turnover, don't worry about having a high PIS score!)
 - Every R1 million rand of turnover or part thereof;
- and
- Every R1 million of outside debt / liabilities or part thereof, as at the end of the year.

Source: <http://practicalaccountancylooseleaf.co.za/content/aadppc2013b-does-your-cc-follow-cc-act-or-companies-act>

The following links might assist the bidder to calculate the Public Interest Score (PIS)

<http://statucor.co.za/public-interest-score>

<https://www.casewareafrica.co.za/interesting-reads/articles/calculate-your-business-s-public-interest-score/>

<http://www.ithembaonline.co.za/wp-content/uploads/2016/10/Public-Interest-Score-Calculator.xlsx>

https://www.exceedinc.co.za/assets/dynamic/70/files/79/6/6_public-interest-score-1--nuutste-weergawe.xlsx

The following links might assist the bidder to get a better understanding of legislative requirements and the Public Interest Score (PIS)

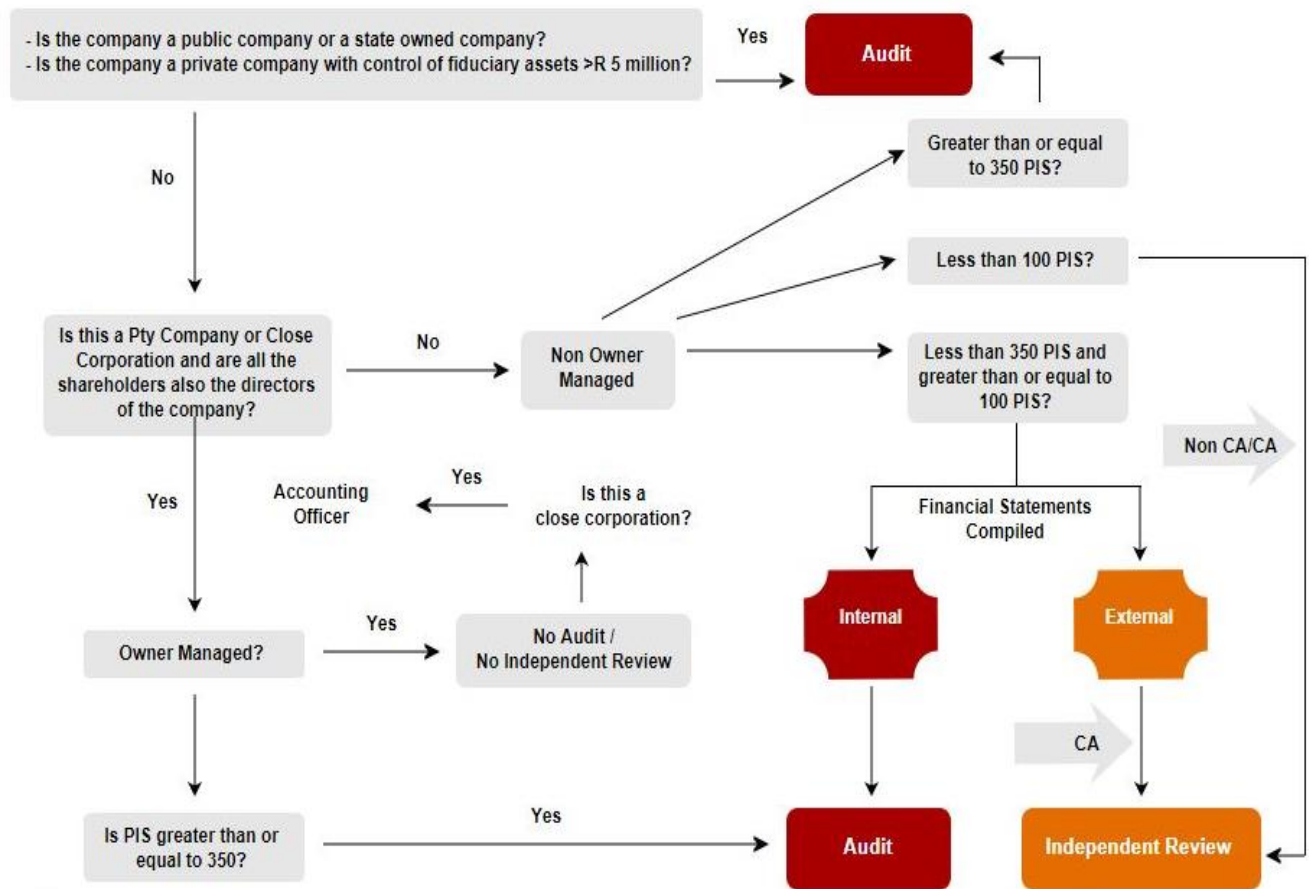
<http://www.cipc.co.za/index.php/manage-your-business/manage-your-company/private-company/compliance-obligations/financial-statements/>

<http://www.cipc.co.za/index.php/manage-your-business/compliance-and-recourse>

https://www2.deloitte.com/content/dam/Deloitte/za/Documents/governance-risk-compliance/ZA_AuditRequirementsAndOtherMattersRelatedToTheAudit_24032014.pdf

<http://www.mdacc.co.za/index.php/companies-act-and-annual-financial-statement-requirements/>

Example of PIS flow chart:



Example of PIS calculation (i.e. during a particular financial year):

Category	Points	Example company	Example score
Annual average Number of employees	1 pt per employee	45	45
Third party liabilities	1 pt per R 1m	R 2,500,000	3
Revenue Sales	1 pt per R 1m	R 5,600 ,000	6
Shareholders	1 pt per shareholder	3	3
Public interest score:			57

ANNEXURE 6.1

MBD 6.1 - PREFERENCE POINTS CLAIM FORM AMENDED IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS OF 2022, AND SPECIFIC GOALS AS PER THE PIKITUP SCM POLICY

IMPORTANT NOTE:

PRICE AND PREFERENCE WILL NOT BE EVALUATED AT THE FIRST STAGE OF THE PROCESS, HOWEVER WILL BE EVALUATED IN THE SECOND (NEXT) STAGE OF THE PROCESS. PREFERENCE CLAIMS FOR SPECIFIC GOALS WILL BE REQUESTED FOR EVALUATION PURPOSES WHEN QUOTATIONS ARE REQUESTED FROM THE PANEL OF PRE-APPROVED SERVICE PROVIDERS ON AN AS AND WHEN BASIS FOR SPECIFIC WORK PACKAGES. THE ATTACHED PREFERENCE POINTS CLAIM FORM (MBD 6.1) IS FOR INFORMATION PURPOSES.

**PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL
PROCUREMENT REGULATIONS 2022, AND THE PIKITUP SCM POLICY**

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 The applicable preference point system for this tender is the **80/20 or 90/10** (*delete whichever is not applicable for this tender*) 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 The maximum points for this tender are allocated as follows: (*delete whichever column is not applicable for this tender*)

POINTS	Tenders R50m and below in value	Tenders above R50m in value
PRICE	80	90
SPECIFIC GOALS	20	10
Total points for Price and Specific Goals	100	100

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

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

2. DEFINITIONS

- (a) “acceptable tender” means any tender which, in all respects, complies with the specifications and conditions of tender as set out in the tender document.
- (b) “affidavit” is a type of verified statement or showing, or in other words, it contains a verification, meaning it is under oath or penalty of perjury, and this serves as evidence to its veracity and is required for court proceedings.
- (c) “all applicable taxes” includes value-added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies;
- (d) “B-BBEE” means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- (e) “B-BBEE status level of contributor” means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- (f) “bid” means a written offer on the official bid documents or invitation of price quotations and “tender” is the act of bidding /tendering;
- (g) “Code of Good Practice” means the generic codes or the sector codes as the case may be;
- (h) “consortium or joint venture” 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; “contract” means the agreement that results from the acceptance of a bid by an organ of state;
- (i) “Disability” means, in respect of a person, a permanent impairment of a physical, intellectual, or sensory function, which results in restricted, or lack of, ability to perform an activity in the manner, or within the range, considered normal for a human being;
- (j) “Exempted Micro Enterprise” (EME) with an annual total revenue of R10 million or less.
- (k) “Firm price” means the price that is only subject to adjustments in accordance with the actual increase or decrease resulting from the change, imposition, or abolition of customs or excise duty and any other duty, levy, or tax, which, in terms of the law or regulation, is binding on the contractor and demonstrably has an influence on the price of any supplies, or the rendering costs of any service, for the execution of the contract;
- (l) “Historically Disadvantaged Individual (HDI)” means a South African citizen – (1) who, due to the apartheid policy that had been in place, had no franchise in national elections prior to the introduction of the Constitution of the Republic of South Africa, 1983 (Act No 110 of 1983) or the Constitution of the Republic of South Africa, 1993 (Act No 200 of 1993) (“the Interim Constitution”); and / or (2) who is a female; and / or (3) who has a disability: Provided that a person who obtained South African citizenship on or after the coming to effect of the Interim Constitution, is deemed not to be an HDI;
- (m) “Integrated Development Plan” (IDP) means a five-year strategic plan required in terms of the Municipal Systems Act, 2000 (Act no 32 of 2000), guiding the City in executing its constitutional mandate.
- (n) “Large Enterprise” is any enterprise with an annual total revenue above R50 million;
- (o) “Locality” means that tenderer or bidder must have business enterprise located within the boundaries of City of Johannesburg (CoJ) Municipal Metropolitan Municipality or Gauteng Province to score points for locality.
- (p) “Lowest acceptable tender” means the tender that complies with all specifications and conditions of the tender and that has the lowest price compared to other tenders
- (q) “non-firm prices” means all prices other than “firm” prices;

- (r) "People with disabilities" has the meaning assigned to it in section 1 of the Employment Equity Act, 1998 (Act no 55 of 1998)
- (s) "person" includes a juristic person;
- (t) "price" means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (u) "Qualifying Small Enterprise" (QSE) with an annual total revenue between R10 million and R50 million;
- (v) "rand value" means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (w) "Small, Medium and Micro Enterprises" SMME that bears the same meaning assigned to this expression in the National Small Business Act 1996 (Act 102 of 1996)
- (x) "Specific goals" means specific goals as contemplated in section 2(1)(d) of the Act which may include contracting with persons, or categories of persons, historically disadvantaged by unfair discrimination on the basis of race, gender, and disability including the implementation of programmes of the Reconstruction and Development Programme as published in Government Gazette No 16085 dated 23 November 1994.
- (y) "sub-contract" means the primary contractor's assigning, leasing, making out work to, or employing, another person to support such primary contractor in the execution of part of a project in terms of the contract.
- (z) "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;
- (aa) "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
- (bb) "the Act" means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000);
- (cc) "the Regulations" means the Preferential Procurement Regulations, 2022 (as amended)
- (dd) "total revenue" bears the same meaning assigned to this expression in the Codes of Good Practice on Black Economic Empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act and promulgated in the Government Gazette on 11 October 2013;

3. THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

3.1. POINTS AWARDED FOR PRICE

3.1.1. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

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

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

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. PREFERENCE 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 or 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,

- (c) then the organ of state must indicate the points allocated for specific goals for both the 80/20 and 90/10 preference point system.

- 4.3. The following specific goals are determined by Pikitup for this tender with the intent to promote HDI and the local economy.

80/20 preference point system				
Specific goals	The specific goals points allocated by Pikitup for this tender	Means of verification	Points allocated for each goal (80/20 system) (Maximum # of points for each goal to be specified by Pikitup)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Goal 1	Enterprises owned by black people with at least 51% shareholding	CSD, Valid BBBEE certificate, Affidavit sworn under oath, copy of owners ID, or shareholders certificate	5	
	Enterprise owned by women with at least 51% shareholding	CSD, Valid BBBEE certificate, Affidavit sworn under oath, copy of owners ID, or shareholders certificate	5	
	Enterprise owned by youth with at least 51% shareholding	CSD, Valid BBBEE certificate, Affidavit sworn under oath, copy of owners ID, or shareholders certificate	0	
	Enterprise owned by people with disabilities with at least with 51% shareholding	CSD, Valid BBBEE certificate, Affidavit sworn under oath, or shareholders certificate	0	
	Co-operatives or Non-Profit Organisations which is at least 51% owned by black people	CSD, Valid BBBEE certificate, Affidavit sworn under oath, copy of owners ID, or CIPC registration document	0	
	Enterprise with B-BBEE status level 1 to 4	Valid BBBEE certificate, Affidavit sworn under oath	0	
Goal 2	SMME's (An EME or QSE)	CSD, Valid BBBEE certificate, Affidavit sworn under oath	5	
	Enterprises located within the City of Johannesburg Metropolitan Municipality	CSD certificate, bidding company municipal account statement, letter or statement from the landlord confirming company address	5	
	Enterprises located within a specific region within the CoJ for work to be done or services to be rendered in that region.	CSD, proof of municipal account, letter or statement from the landlord, letter from the Ward Council confirming the business address	0	
	Enterprises located in Townships	CSD, proof of municipal account, letter or statement from the landlord, letter from the Ward Council confirming the business address	0	
	Subcontracting to business owned by designated groups (up to 30%)	Commitment letter confirming subcontracting the designated groups, draft subcontracting agreement to the designated groups and Valid BBBEE certificate or Affidavit sworn under oath of the subcontracted business	0	
Total (Maximum number of preference points)			20	

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90/10 preference point system				
Specific goals	The specific goals points allocated by Pikitup for this tender	Means of verification	Points allocated for each goal (90/10 system) (Maximum # of points for each goal to be specified by Pikitup)	Number of points claimed (90/10 system) (To be completed by the tenderer)
Goal 1	Enterprises owned by black people with at least 51% shareholding	CSD, Valid BBBEE certificate, Affidavit sworn under oath, copy of owners ID, or shareholders certificate	2.5	
	Enterprise owned by women with at least 51% shareholding	CSD, Valid BBBEE certificate, Affidavit sworn under oath, copy of owners ID, or shareholders certificate	2.5	
	Enterprise owned by youth with at least 51% shareholding	CSD, Valid BBBEE certificate, Affidavit sworn under oath, copy of owners ID, or shareholders certificate	0	
	Enterprise owned by people with disabilities with at least with 51% shareholding	CSD, Valid BBBEE certificate, Affidavit sworn under oath, or shareholders certificate	0	
	Co-operatives or Non-Profit Organisations which is at least 51% owned by black people	CSD, Valid BBBEE certificate, Affidavit sworn under oath, copy of owners ID, or CIPC registration document	0	
	Enterprise with B-BBEE status level 1 to 4	Valid BBBEE certificate, Affidavit sworn under oath	0	
Goal 2	SMME's (An EME or QSE)	CSD, Valid BBBEE certificate, Affidavit sworn under oath	2.5	
	Enterprises located within the City of Johannesburg Metropolitan Municipality	CSD, proof of municipal account, letter or statement from the landlord	2.5	
	Enterprises located within a specific region within the CoJ for work to be done or services to be rendered in that region.	CSD, proof of municipal account, letter or statement from the landlord, letter from the Ward Council confirming the business address	0	
	Enterprises located in Townships	CSD, proof of municipal account, letter or statement from the landlord, letter from the Ward Council confirming the business address	0	
	Subcontracting to business owned by designated groups (up to 30%)	Commitment letter confirming subcontracting the designated groups, draft subcontracting agreement to the designated groups and Valid BBBEE certificate or Affidavit sworn under oath of the subcontracted business	0	
Total (Maximum number of preference points)			10	

Table 1: Specific goals for the tender and points claimed are indicated per the table above.

(Note to organs of state: Where either the 80/20 or 90/10 preference point system is applicable, corresponding points must also be indicated as such. Delete the table that is not applicable to this tender)

Note to tenderers: The tenderer must indicate in the table the points claimed against each goal where provisions are made for preference points to be claimed. Points claimed will be verified

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with supporting documents submitted. Where preference points are not claimed by the bidder, or in the case where the points claimed differ from the evidence as per the supporting documents submitted, the bidder will not be allocated points for the goal.

5. DECLARATION WITH REGARD TO COMPANY/FIRM

5.1. Name of company/firm:

5.2. Company registration number:

5.3. TYPE OF COMPANY/ FIRM

- ☐ (Pty) Limited
- ☐ Close corporation
- ☐ Public Company
- ☐ One-person business/sole propriety
- ☐ Personal Liability Company
- ☐ Partnership/Joint Venture / Consortium
- ☐ Co-operative
- ☐ Non-Profit Company
- ☐ State Owned Company
- ☐ Other

[TICK APPLICABLE BOX]

5.4. 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 OF TENDERER: DATE:

NAME AND SURNAME:

ADDRESS:

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ANNEXURE 7

CONTRACT FORM

MBD 7.2 – RENDERING OF SERVICES

CONTRACT FORM - RENDERING OF SERVICES

THIS FORM MUST BE FILLED IN DUPLICATE BY BOTH THE SERVICE PROVIDER (PART 1) AND THE PURCHASER (PART 2). BOTH FORMS MUST BE SIGNED IN THE ORIGINAL SO THAT THE SERVICE PROVIDER AND THE PURCHASER WOULD BE IN POSSESSION OF ORIGINALLY SIGNED CONTRACTS FOR THEIR RESPECTIVE RECORDS.

PART 1 (TO BE FILLED IN BY THE SERVICE PROVIDER)

1. I hereby undertake to render services described in the attached bidding documents to **PIKITUP JOHANNESBURG SOC LTD** in accordance with the requirements and task directives / proposals specifications stipulated in Bid Number **PU143/2024** at the price/s quoted. My offer/s remain binding upon me and open for acceptance by the Purchaser during the validity period indicated and calculated from the closing date of the bid.
2. The following documents shall be deemed to form and be read and construed as part of this agreement:
 - (i) Bidding documents, viz
 - Invitation to bid;
 - Tax clearance certificate;
 - Pricing schedule(s);
 - Filled in task directive/proposal;
 - Preference claims for Specific Goals in terms of Pikitup SCM Policy;
 - Declaration of interest;
 - Declaration of Bidder's past SCM practices;
 - Certificate of Independent Bid Determination;
 - Special Conditions of Contract;
 - (ii) General Conditions of Contract; and
 - (iii) Other (specify)
3. I confirm that I have satisfied myself as to the correctness and validity of my bid; that the price(s) and rate(s) quoted cover all the services specified in the bidding documents; that the price(s) and rate(s) cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.
4. I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this agreement as the principal liable for the due fulfillment of this contract.
5. I declare that I have no participation in any collusive practices with any bidder or any other person regarding this or any other bid.
6. I confirm that I am duly authorised to sign this contract.

NAME (PRINT)

CAPACITY

SIGNATURE

NAME OF FIRM

DATE

WITNESSES

1

2

BID REFERENCE NUMBER PU143/2024 FOR THE APPOINTMENT OF A PANEL OF A MAXIMUM 30 MULTI-DISCIPLINARY CONSULTANTS TO SUPPORT PIKITUP (SOC) LTD ON VARIOUS PROJECTS ON AN AS AND WHEN REQUIRED BASIS FOR THE PERIOD OF 36 MONTHS FROM THE DATE OF APPOINTMENT

CONTRACT FORM - RENDERING OF SERVICES

PART 2 (TO BE FILLED IN BY THE PURCHASER)

1. I in my capacity as accept your bid under reference number **PU143/2024** dated for the rendering of services indicated hereunder and/or further specified in the annexure(s).
2. An official order indicating service delivery instructions is forthcoming.
3. I undertake to make payment for the services rendered in accordance with the terms and conditions of the contract, within 30 (thirty) days after receipt of an invoice.

DESCRIPTION OF SERVICE	PRICE (ALL APPLICABLE TAXES INCLUDED)	COMPLETION DATE	MINIMUM THRESHOLD FOR LOCAL PRODUCTION AND CONTENT (if applicable)
Not applicable	Not applicable	Not applicable	Not applicable

4. I confirm that I am duly authorised to sign this contract.

SIGNED AT:

NAME (PRINT):

SIGNATURE:

DATE:

Witness: 1.

Witness: 2.

ANNEXURE 8

DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

BID REFERENCE NUMBER PU143/2024 FOR THE APPOINTMENT OF A PANEL OF A MAXIMUM 30 MULTI-DISCIPLINARY CONSULTANTS TO SUPPORT PIKITUP (SOC) LTD ON VARIOUS PROJECTS ON AN AS AND WHEN REQUIRED BASIS FOR THE PERIOD OF 36 MONTHS FROM THE DATE OF APPOINTMENT

MBD 8

DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

- 1 This Municipal Bidding Document must form part of all bids invited.
- 2 It serves as a declaration to be used by municipalities and municipal entities in ensuring that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system.
- 3 The bid of any bidder may be rejected if that bidder, or any of its directors have:
 - a. abused the municipality's / municipal entity's supply chain management system or committed any improper conduct in relation to such system;
 - b. been convicted for fraud or corruption during the past five years;
 - c. willfully neglected, reneged on or failed to comply with any government, municipal or other public sector contract during the past five years; or
 - d. been listed in the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004).
- 4 In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

Item	Question	Yes	No
4.1	Is the bidder or any of its directors listed on the National Treasury's Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector? (Companies or persons who are listed on this Database were informed in writing of this restriction by the Accounting Officer/Authority of the institution that imposed the restriction after the <i>audi alteram partem</i> rule was applied). The Database of Restricted Suppliers now resides on the National Treasury's website (www.treasury.gov.za) and can be accessed by clicking on its link at the bottom of the home page.	Yes ☐	No ☐
4.1.1	If so, furnish particulars:		
4.2	Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)? The Register for Tender Defaulters can be accessed on the National Treasury's website (www.treasury.gov.za) by clicking on its link at the bottom of the home page.	Yes ☐	No ☐
4.2.1	If so, furnish particulars:		

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4.3	Was the bidder or any of its directors convicted by a court of law (including a court of law outside the Republic of South Africa) for fraud or corruption during the past five years?	Yes ☐	No ☐
4.3.1	If so, furnish particulars:		
Item	Question	Yes	No
4.4	Does the bidder or any of its directors owe any municipal rates and taxes or municipal charges to the municipality / municipal entity, or to any other municipality / municipal entity, that is in arrears for more than three months?	Yes ☐	No ☐
4.4.1	If so, furnish particulars:		
4.5	Was any contract between the bidder and the municipality / municipal entity or any other organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	Yes ☐	No ☐
4.7.1	If so, furnish particulars:		

CERTIFICATION

I, THE UNDERSIGNED (FULL NAME)
 CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM ARE
 TRUE AND CORRECT.

I ACCEPT THAT, IN ADDITION TO CANCELLATION OF A CONTRACT, ACTION MAY
 BE TAKEN AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature

.....
Date

.....
Position

.....
Name of Bidder

ANNEXURE 9

BID REFERENCE NUMBER PU143/2024 FOR THE APPOINTMENT OF A PANEL OF A MAXIMUM 30 MULTI-DISCIPLINARY CONSULTANTS TO SUPPORT PIKITUP (SOC) LTD ON VARIOUS PROJECTS ON AN AS AND WHEN REQUIRED BASIS FOR THE PERIOD OF 36 MONTHS FROM THE DATE OF APPOINTMENT

MBD 9

CERTIFICATE OF INDEPENDENT BID DETERMINATION

- 1 This Municipal Bidding Document (MBD) must form part of all bids¹ invited.
- 2 Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by, firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging).² Collusive bidding is a *per se* prohibition meaning that it cannot be justified under any grounds.
- 3 Municipal Supply Regulation 38 (1) prescribes that a supply chain management policy must provide measures for the combating of abuse of the supply chain management system, and must enable the accounting officer, among others, to:
 - a. take all reasonable steps to prevent such abuse;
 - b. reject the bid of any bidder if that bidder or any of its directors has abused the supply chain management system of the municipality or municipal entity or has committed any improper conduct in relation to such system; and
 - c. cancel a contract awarded to a person if the person committed any corrupt or fraudulent act during the bidding process or the execution of the contract.
- 4 This MBD serves as a certificate of declaration that would be used by institutions to ensure that, when bids are considered, reasonable steps are taken to prevent any form of bid-rigging.
- 5 In order to give effect to the above, the attached Certificate of Bid Determination (MBD 9) must be completed and submitted with the bid:

¹ Includes price quotations, advertised competitive bids, limited bids and proposals.

² Bid rigging (or collusive bidding) occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and / or services for purchasers who wish to acquire goods and / or services through a bidding process. Bid rigging is, therefore, an agreement between competitors not to compete.

MBD 9
CERTIFICATE OF INDEPENDENT BID DETERMINATION

I, the undersigned, in submitting the accompanying bid:

(Bid Number and Description)

in response to the invitation for the bid made by:

(Name of Municipality / Municipal Entity)

do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of _____ (Name of Bidder)
that:

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign, the bid, on behalf of the bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:
 - (a) has been requested to submit a bid in response to this bid invitation;
 - (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
 - (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder
6. 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 consortium³ will not be construed as collusive bidding.

7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
 - (a) prices;
 - (b) geographical area where product or service will be rendered (market allocation)
 - (c) methods, factors or formulas used to calculate prices;
 - (d) the intention or decision to submit or not to submit, a bid;
 - (e) the submission of a bid which does not meet the specifications and conditions of the bid; or
 - (f) bidding with the intention not to win the bid.
8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.
9. 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.
10. 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.

.....
Signature

.....
Date

.....
Position

.....
Name of Bidder

³ 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

ANNEXURE 10

CORPORATE GOVERNANCE BREACH CLAUSE

BID REFERENCE NUMBER PU143/2024 FOR THE APPOINTMENT OF A PANEL OF A MAXIMUM 30 MULTI-DISCIPLINARY CONSULTANTS TO SUPPORT PIKITUP (SOC) LTD ON VARIOUS PROJECTS ON AN AS AND WHEN REQUIRED BASIS FOR THE PERIOD OF 36 MONTHS FROM THE DATE OF APPOINTMENT

CORPORATE GOVERNANCE BREACH CLAUSE

1. PIKITUP Johannesburg (SOC) LTD (“PIKITUP”) requires (“the Company”) to comply, *mutatis mutandis* with the Code contained in the King II Report and Code of Good Corporate Governance (below “the Code”) for the term of this Agreement and any extension thereof.
2. The Company irrevocably undertakes and agrees that it will, *mutatis mutandis*, comply with the Code for the term of this Agreement and any extensions thereof.
3. The Company acknowledges and agrees that:
 - 3.1 It is essential that the Company complies with the Code, in order to discharge all of its obligations under and in terms of the Agreement in a proper, efficient and professional manner, and
 - 3.2 PIKITUP will be prejudiced and may suffer damages in the event of the Company failing to comply with the Code.
4. The Company shall be required, within seven (7) days of the end of each calendar month during the term of this Agreement (and any extensions thereof), to furnish PIKITUP with a written certificate, signed by the directors of the Company **[alternatively members of the Close Corporation]**, certifying that the Company has complied with the provisions of the Code during the preceding months.
5. PIKITUP shall have the right, without assigning any reason therefore and at any time, to appoint either the Institute of Directors of South Africa or a firm of chartered accountants or attorneys, to conduct an audit of the business and affairs of the Company in order to ascertain whether the Company is indeed complying with the terms of the Code. To this end, the Company irrevocably undertakes and agrees to co-operate fully with the party conducting such investigation for and on behalf of PIKITUP and to make available to such party all such documentation and all such information as the investigation party may require to fully discharge its obligations under and in terms hereof and to report fully to PIKITUP.

In the event of it being found that the Company is not complying with the Code, then PIKITUP shall be entitled to (a) regard this as a breach of the agreement and (b) recover the costs of the investigation, on an attorney and client basis, from the Company. In the event of it being found that the Company is, in fact, discharging its obligations under and in terms of the Code, then PIKITUP shall bear the costs incurred in such investigation.

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In either of the foregoing events, the Company shall be entitled to receive a copy of the written report once same has been concluded by the investigating party.

- 6. In the event of the Code being replaced with another Code (or similar document), then such replacement document shall replace the Code and a reference to the Code shall be deemed to be a reference to such replacement document. The reference to the Code shall be deemed to include any statutory codification of directors' obligations and duties which may be enacted in the Republic of South Africa at any time in the future.
- 7. In entering into this Agreement, the Company represents and warrants to PIKITUP that it is familiar with the Code, that it fully understands and appreciates the rights, obligations and recommendations therein contained and agrees to be bound thereby as herein recorded.

..... Signature	 Date
..... Position	 Name of Bidder

ANNEXURE 11

The National Treasury General Conditions of Contract 2010 as well as specific conditions of contract for this bid will apply. The GCC is available on www.nationaltreasury.gov.za. Any additional terms and conditions will form part of special conditions of contract to be agreed and signed upon award of the bid. The contract will have to be signed by the successful bidder before the project commence. A service level agreement must be entered into by the awarded bidder and PIKITUP within 30 days of award of contract.

The following agreement is a draft agreement (indicating the specific conditions of contract) and will be concluded at bid award with the successful bidder/s.

ANNEXURE 12

**ALL COMPULSORY RETURNABLE DOCUMENTS
AND OTHER RETURNABLE DOCUMENTS TO BE
ATTACHED**

The bid response format must be as follows:

- Fully completed and signed bid document including but not limited to all MBD documents (i.e. MBD1, MBD4, MBD5, MBD8 and MBD9), authority to sign the bid, certificate for payment of municipal services or other service provider, conditions of tender, Public Interest Score (PIS) for each financial year, corporate governance breach clause, etc.
- Central Supplier Database (CSD) registration and Tax Pin
- Bidding Company's CIPC document
- Bidding Company's owners / members / directors / major shareholders copy of ID's
- Bidding company's payment of municipal services or other service provider
- Bidding company's owners / members / directors / major shareholders payment of municipal services or other service provider
- Annual Financial Statements for the most recent past three (3) years or financial statements from date of existence for companies less than three years.
- Joint venture agreement (if applicable)
- Copy of BBBEE Scorecard or sworn affidavit
- Company Profile
- Other supporting documents that may be deemed necessary for evaluation purposes

Other returnable documents used for functionality evaluation

(Note: Bidders must submit the functionality evaluation for each of the categories which are applied for. Documented response for each category must be clearly separated. Bidders will only be evaluated for the categories as specified on the cover page of the bid.)

- CATEGORY A - PROJECT MANAGEMENT CONSORTIUM (Minor PPP)
- CATEGORY B - PROJECT MANAGEMENT CONSORTIUM (Major PPP)
- CATEGORY C - ENGINEERING SERVICES (Infrastructure projects)
- CATEGORY D - SPECIALIST STUDIES
- CATEGORY E - LAND SURVEYOR
- CATEGORY F - TOWN PLANNING SERVICES

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CENTRAL SUPPLIER DATABASE (CSD) REGISTRATION AND TAX COMPLIANCE STATUS

BID REFERENCE NUMBER PU143/2024 FOR THE APPOINTMENT OF A PANEL OF A MAXIMUM 30 MULTI-DISCIPLINARY CONSULTANTS TO SUPPORT PIKITUP (SOC) LTD ON VARIOUS PROJECTS ON AN AS AND WHEN REQUIRED BASIS FOR THE PERIOD OF 36 MONTHS FROM THE DATE OF APPOINTMENT

BIDDER COMPANY REGISTRATION (CIPC) DOCUMENT

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**BIDDING COMPANY'S OWNERS / MEMBERS / DIRECTORS
/ MAJOR SHAREHOLDERS COPY OF ID'S**

BID REFERENCE NUMBER PU143/2024 FOR THE APPOINTMENT OF A PANEL OF A MAXIMUM 30 MULTI-DISCIPLINARY CONSULTANTS TO SUPPORT PIKITUP (SOC) LTD ON VARIOUS PROJECTS ON AN AS AND WHEN REQUIRED BASIS FOR THE PERIOD OF 36 MONTHS FROM THE DATE OF APPOINTMENT

BIDDING COMPANY'S PAYMENT OF MUNICIPAL SERVICES (OR OTHER SERVICE PROVIDER)

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**BIDDING COMPANY'S OWNERS / MEMBERS / DIRECTORS
/ MAJOR SHAREHOLDERS PAYMENT OF MUNICIPAL
SERVICES (OR OTHER SERVICE PROVIDER)**

BID REFERENCE NUMBER PU143/2024 FOR THE APPOINTMENT OF A PANEL OF A MAXIMUM 30 MULTI-DISCIPLINARY CONSULTANTS TO SUPPORT PIKITUP (SOC) LTD ON VARIOUS PROJECTS ON AN AS AND WHEN REQUIRED BASIS FOR THE PERIOD OF 36 MONTHS FROM THE DATE OF APPOINTMENT

**ANNUAL FINANCIAL STATEMENTS FOR THE MOST
RECENT PAST THREE (3) YEARS OR ANNUAL FINANCIAL
STATEMENTS FROM DATE OF EXISTENCE.**

JOINT VENTURE AGREEMENT (IF APPLICABLE)

BID REFERENCE NUMBER PU143/2024 FOR THE APPOINTMENT OF A PANEL OF A MAXIMUM 30 MULTI-DISCIPLINARY CONSULTANTS TO SUPPORT PIKITUP (SOC) LTD ON VARIOUS PROJECTS ON AN AS AND WHEN REQUIRED BASIS FOR THE PERIOD OF 36 MONTHS FROM THE DATE OF APPOINTMENT

COPY OF BBBEE SCORECARD OR SWORN AFFIDAVIT

BID REFERENCE NUMBER PU143/2024 FOR THE APPOINTMENT OF A PANEL OF A MAXIMUM 30 MULTI-DISCIPLINARY CONSULTANTS TO SUPPORT PIKITUP (SOC) LTD ON VARIOUS PROJECTS ON AN AS AND WHEN REQUIRED BASIS FOR THE PERIOD OF 36 MONTHS FROM THE DATE OF APPOINTMENT

COMPANY PROFILE

OTHER SUPPORTING DOCUMENTS THAT MAY BE DEEMED NECESSARY FOR EVALUATION PURPOSES

BID REFERENCE NUMBER PU143/2024 FOR THE APPOINTMENT OF A PANEL OF A MAXIMUM 30 MULTI-DISCIPLINARY CONSULTANTS TO SUPPORT PIKITUP (SOC) LTD ON VARIOUS PROJECTS ON AN AS AND WHEN REQUIRED BASIS FOR THE PERIOD OF 36 MONTHS FROM THE DATE OF APPOINTMENT

CATEGORY A - PROJECT MANAGEMENT CONSORTIUM (MINOR PPP)

The below supporting documentation are to be attached for the evaluation team to verify the information as specified in the evaluation criteria for this category:

- Appointment letters that relate to evaluation criteria for Category A
- Contactable reference letters that relate to evaluation criteria for Category A
- Qualifications that relate to evaluation criteria for Category A
- CV's that relate to evaluation criteria for Category A
- Professional registration certificates that relate to evaluation criteria for Category A

Bidders should complete the below schedules to summarise the information and must ensure that supporting documents are submitted substantiating the information as per the evaluation criteria requirements specified in the tender document.

Summary of bidding company previous experience that relate to this category:

Number	Short Description of Project	Project start date	Project end date
1			
2			
3			
4			
5			
6			
7			
8			

Contactable references that relate to this category:

Number	Reference Company Name	Short Description of Project
1		
2		
3		
4		
5		
6		
7		
8		

BID REFERENCE NUMBER PU143/2024 FOR THE APPOINTMENT OF A PANEL OF A MAXIMUM 30 MULTI-DISCIPLINARY CONSULTANTS TO SUPPORT PIKITUP (SOC) LTD ON VARIOUS PROJECTS ON AN AS AND WHEN REQUIRED BASIS FOR THE PERIOD OF 36 MONTHS FROM THE DATE OF APPOINTMENT

Summary of **Project Manager (Team Leader)** details.

Description	Bidder to complete the details below
Name(s)	
Surname	
ID Number	
Date employed by bidding company	
Total full years' work experience after qualification was obtained	
Description of relevant Qualification	
Date the above qualification was obtained	
Professional registration certificate number	

Summary of **Project Team Legal Adviser** details.

Description	Bidder to complete the details below
Name(s)	
Surname	
ID Number	
Date employed by bidding company	
Total full years' work experience after qualification was obtained	
Description of relevant Qualification	
Date the above qualification was obtained	
Professional registration certificate number	

Summary of bidding company financial numbers:

Number	Year 1 Most recent financial year	Year 2 Previous financial year	Year 3 Prior financial year
Current Assets	R	R	R
Current Liability	R	R	R
Earnings before Interest and Taxes	R	R	R
Interest	R	R	R

BID REFERENCE NUMBER PU143/2024 FOR THE APPOINTMENT OF A PANEL OF A MAXIMUM 30 MULTI-DISCIPLINARY CONSULTANTS TO SUPPORT PIKITUP (SOC) LTD ON VARIOUS PROJECTS ON AN AS AND WHEN REQUIRED BASIS FOR THE PERIOD OF 36 MONTHS FROM THE DATE OF APPOINTMENT

CATEGORY B - PROJECT MANAGEMENT CONSORTIUM (MAJOR PPP)

The below supporting documentation are to be attached for the evaluation team to verify the information as specified in the evaluation criteria for this category:

- Appointment letters that relate to evaluation criteria for Category B
- Contactable reference letters that relate to evaluation criteria for Category B
- Qualifications that relate to evaluation criteria for Category B
- CV's that relate to evaluation criteria for Category B
- Professional registration certificates that relate to evaluation criteria for Category B

Bidders should complete the below schedules to summarise the information and must ensure that supporting documents are submitted substantiating the information as per the evaluation criteria requirements specified in the tender document.

Summary of bidding company previous experience that relate to this category:

Number	Short Description of Project	Project start date	Project end date
1			
2			
3			
4			
5			
6			
7			
8			

Contactable references that relate to this category:

Number	Reference Company Name	Short Description of Project
1		
2		
3		
4		
5		
6		
7		
8		

Summary of **Project Manager (Team Leader)** details.

Description	Bidder to complete the details below
Name(s)	
Surname	
ID Number	
Date employed by bidding company	
Total full years' work experience after qualification was obtained	
Description of relevant Qualification	
Date the above qualification was obtained	
Professional registration certificate number	

Summary of **Project Team Legal Adviser** details.

Description	Bidder to complete the details below
Name(s)	
Surname	
ID Number	
Date employed by bidding company	
Total full years' work experience after qualification was obtained	
Description of relevant Qualification	
Date the above qualification was obtained	
Professional registration certificate number	

Summary of bidding company financial numbers:

Number	Year 1 Most recent financial year	Year 2 Previous financial year	Year 3 Prior financial year
Current Assets	R	R	R
Current Liability	R	R	R
Earnings before Interest and Taxes	R	R	R
Interest	R	R	R

BID REFERENCE NUMBER PU143/2024 FOR THE APPOINTMENT OF A PANEL OF A MAXIMUM 30 MULTI-DISCIPLINARY CONSULTANTS TO SUPPORT PIKITUP (SOC) LTD ON VARIOUS PROJECTS ON AN AS AND WHEN REQUIRED BASIS FOR THE PERIOD OF 36 MONTHS FROM THE DATE OF APPOINTMENT

CATEGORY C - ENGINEERING SERVICES (INFRASTRUCTURE PROJECTS)

The below supporting documentation are to be attached for the evaluation team to verify the information as specified in the evaluation criteria for this category:

- Appointment letters that relate to evaluation criteria for Category C
- Contactable reference letters that relate to evaluation criteria for Category C
- Qualifications that relate to evaluation criteria for Category C
- CV's that relate to evaluation criteria for Category C
- Professional registration certificates that relate to evaluation criteria for Category C

Bidders should complete the below schedules to summarise the information and must ensure that supporting documents are submitted substantiating the information as per the evaluation criteria requirements specified in the tender document.

Summary of bidding company previous experience that relate to this category:

Number	Short Description of Project	Project start date	Project end date
1			
2			
3			
4			
5			
6			
7			
8			

Contactable references that relate to this category:

Number	Reference Company Name	Short Description of Project
1		
2		
3		
4		
5		
6		
7		
8		

BID REFERENCE NUMBER PU143/2024 FOR THE APPOINTMENT OF A PANEL OF A MAXIMUM 30 MULTI-DISCIPLINARY CONSULTANTS TO SUPPORT PIKITUP (SOC) LTD ON VARIOUS PROJECTS ON AN AS AND WHEN REQUIRED BASIS FOR THE PERIOD OF 36 MONTHS FROM THE DATE OF APPOINTMENT

Summary of **Project Manager** details.

Description	Bidder to complete the details below
Name(s)	
Surname	
ID Number	
Date employed by bidding company	
Total full years' work experience after qualification was obtained	
Description of relevant Qualification	
Date the above qualification was obtained	
Professional registration certificate number	

Summary of **Resident Engineer** details.

Description	Bidder to complete the details below
Name(s)	
Surname	
ID Number	
Date employed by bidding company	
Total full years' work experience after qualification was obtained	
Description of relevant Qualification	
Date the above qualification was obtained	
Professional registration certificate number	

Summary of bidding company financial numbers:

Number	Year 1 Most recent financial year	Year 2 Previous financial year	Year 3 Prior financial year
Current Assets	R	R	R
Current Liability	R	R	R
Earnings before Interest and Taxes	R	R	R
Interest	R	R	R

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CATEGORY D - SPECIALIST STUDIES

The below supporting documentation are to be attached for the evaluation team to verify the information as specified in the evaluation criteria for this category:

- Appointment letters that relate to evaluation criteria for Category D
- Contactable reference letters that relate to evaluation criteria for Category D
- Qualifications that relate to evaluation criteria for Category D
- CV's that relate to evaluation criteria for Category D
- Professional registration certificates that relate to evaluation criteria for Category D

Bidders should complete the below schedules to summarise the information and must ensure that supporting documents are submitted substantiating the information as per the evaluation criteria requirements specified in the tender document.

Summary of bidding company previous experience that relate to this category:

Number	Short Description of Project	Project start date	Project end date
1			
2			
3			
4			
5			
6			
7			
8			

Contactable references that relate to this category:

Number	Reference Company Name	Short Description of Project
1		
2		
3		
4		
5		
6		
7		
8		

Summary of **Environmental Specialist** details.

Description	Bidder to complete the details below
Name(s)	
Surname	
ID Number	
Date employed by bidding company	
Total full years' work experience after qualification was obtained	
Description of relevant Qualification	
Date the above qualification was obtained	
Professional registration certificate number	

Summary of **Feasibility Study Team Leader** details.

Description	Bidder to complete the details below
Name(s)	
Surname	
ID Number	
Date employed by bidding company	
Total full years' work experience after qualification was obtained	
Description of relevant Qualification	
Date the above qualification was obtained	
Professional registration certificate number	

Summary of bidding company financial numbers:

Number	Year 1 Most recent financial year	Year 2 Previous financial year	Year 3 Prior financial year
Current Assets	R	R	R
Current Liability	R	R	R
Earnings before Interest and Taxes	R	R	R
Interest	R	R	R

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CATEGORY E - LAND SURVEYOR

The below supporting documentation are to be attached for the evaluation team to verify the information as specified in the evaluation criteria for this category:

- Appointment letters that relate to evaluation criteria for Category E
- Contactable reference letters that relate to evaluation criteria for Category E
- Qualifications that relate to evaluation criteria for Category E
- CV's that relate to evaluation criteria for Category E
- Professional registration certificates that relate to evaluation criteria for Category E

Bidders should complete the below schedules to summarise the information and must ensure that supporting documents are submitted substantiating the information as per the evaluation criteria requirements specified in the tender document.

Summary of bidding company previous experience that relate to this category:

Number	Short Description of Project	Project start date	Project end date
1			
2			
3			
4			
5			
6			
7			
8			

Contactable references that relate to this category:

Number	Reference Company Name	Short Description of Project
1		
2		
3		
4		
5		
6		
7		
8		

Summary of **Land Surveyor** details.

Description	Bidder to complete the details below
Name(s)	
Surname	
ID Number	
Date employed by bidding company	
Total full years' work experience after qualification was obtained	
Description of relevant Qualification	
Date the above qualification was obtained	
Professional registration certificate number	

Summary of **Assistant Land Surveyor** details.

Description	Bidder to complete the details below
Name(s)	
Surname	
ID Number	
Date employed by bidding company	
Total full years' work experience after qualification was obtained	
Description of relevant Qualification	
Date the above qualification was obtained	
Professional registration certificate number	

Summary of bidding company financial numbers:

Number	Year 1 Most recent financial year	Year 2 Previous financial year	Year 3 Prior financial year
Current Assets	R	R	R
Current Liability	R	R	R
Earnings before Interest and Taxes	R	R	R
Interest	R	R	R

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CATEGORY F - TOWN PLANNING SERVICES

The below supporting documentation are to be attached for the evaluation team to verify the information as specified in the evaluation criteria for this category:

- Appointment letters that relate to evaluation criteria for Category F
- Contactable reference letters that relate to evaluation criteria for Category F
- Qualifications that relate to evaluation criteria for Category F
- CV's that relate to evaluation criteria for Category F
- Professional registration certificates that relate to evaluation criteria for Category F

Bidders should complete the below schedules to summarise the information and must ensure that supporting documents are submitted substantiating the information as per the evaluation criteria requirements specified in the tender document.

Summary of bidding company previous experience that relate to this category:

Number	Short Description of Project	Project start date	Project end date
1			
2			
3			
4			
5			
6			
7			
8			

Contactable references that relate to this category:

Number	Reference Company Name	Short Description of Project
1		
2		
3		
4		
5		
6		
7		
8		

Summary of **Lead Town Planner's** details.

Description	Bidder to complete the details below
Name(s)	
Surname	
ID Number	
Date employed by bidding company	
Total full years' work experience after qualification was obtained	
Description of relevant Qualification	
Date the above qualification was obtained	
Professional registration certificate number	

Summary of **Assistant Town Planner's** details.

Description	Bidder to complete the details below
Name(s)	
Surname	
ID Number	
Date employed by bidding company	
Total full years' work experience after qualification was obtained	
Description of relevant Qualification	
Date the above qualification was obtained	
Professional registration certificate number	

Summary of bidding company financial numbers:

Number	Year 1 Most recent financial year	Year 2 Previous financial year	Year 3 Prior financial year
Current Assets	R	R	R
Current Liability	R	R	R
Earnings before Interest and Taxes	R	R	R
Interest	R	R	R

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