



MUNICIPAL INFRASTRUCTURE SUPPORT AGENT (MISA)

BID NO: MISA/CMS/OFA/014/2026/2027

APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT AN ORGANISATIONAL FUNCTIONALITY ASSESSMENT TO EVALUATE THE FUNCTIONALITY, EFFECTIVENESS AND EFFICIENCY OF MISA AS WELL AS THE RESPONSIVENESS OF THE ORGANISATIONAL STRUCTURE TO ITS MANDATE

Beneficiary	Municipal Infrastructure Support Agent
Contact Person	Ms Mandy Batyi: 012 848 5300 or tenders@misa.gov.za
Postal Address	1303 Heuwel Avenue, Riverside Office Park, Letaba House, Centurion 0046
Bid No.	MISA/CMS/OFA/014/2026/2027
Compulsory Hybrid Briefing Session Date	Compulsory hybrid Briefing session– at MISA offices: 02 September 2026 @ 10h00 Letaba House Main boardroom, 1st floor, 1303 Heuwel Avenue, Riverside Office Park, Letaba House, Centurion 0046 Or Microsoft Teams meeting Join: https://teams.microsoft.com/meet/370207372181182?p=npn7AynlCYSfsgNK8N Meeting ID: 370 207 372 181 182 Passcode: Av6JY7ec
Closing Date and time	15 September 2026 @ 11h00
Bid/Tender Amount	R.....

1. INVITATION

The Municipal Infrastructure Support Agent (**MISA**) intends to conduct a diagnostic analysis of the alignment of the organisational structure to the mandate of MISA.

2. DURATION

MISA seeks to appoint a Service Provider to conduct organisational functionality assessment in line with the Constitution of RSA, the Public Service Regulations and DPSA prescripts for a period of six (6) months. MISA may extend the duration at its discretion if necessary.

3. BACKGROUND

3.1 The Municipal Infrastructure Support Agent (MISA) is a government component in terms of section 7(5)(c) of the Public Service Act, 1994 (promulgated under Proclamation No. 103 of 1994). It has been established under the executive authority of the Minister for Cooperative Governance and Traditional Affairs, with the Department of Cooperative Governance (DCoG) as its principal department. Accordingly, MISA operates within the department's broader legislative and policy mandates.

3.2 The Municipal Infrastructure Support Agent (MISA), as a national government component established to support municipalities with infrastructure planning, delivery, management and operation & maintenance with the view to improve service delivery, acknowledges the integral role of effective, efficient and functional organizational structures, processes and systems in achieving institutional effectiveness. As a knowledge – and service-driven organization operating under high-performance demands, MISA does not have room to under-perform or fail in discharging its mandate as this would have dire consequences for service delivery and therefore South African communities.

3.3 Section 195 of the Constitution of RSA, 1996 sets out basic values and principles which govern the public service which are applicable to all organs of state or public institutions. Amongst these principles is the promotion of efficient, economic and effective use of resources; and public administrations that are development oriented.

3.4 Furthermore, in terms of regulation 25 of the Public Service Regulations, 2016 an executive authority must ensure that his or her department prepares a strategic plan for implementation during his or her term of office.

3.5 In implementing the strategic plan, an accounting officer must promote:

3.5.1 the efficient, economic and effective use of resources (including human resources) to improve the functioning of the department, and to that end, develop an organizational structure or,

3.5.2 where an organizational structure is in place, apply working methods such as the re-allocation, simplification and co-ordination of work to eliminate unnecessary duplications, functions and systems. In terms of regulation 35 of the Public Service Regulations,

3.5.3 an executive authority must conduct an organisational functionality assessment to assess the efficiency and effectiveness of a department's organisational structure, internal systems and processes, and to facilitate

the improvement of the department's functionality, performance, efficiency and effectiveness.

- 3.6 The project therefore seeks to appoint a service provider that will conduct an organisational functionality assessment to diagnose, based on evidence, the functionality, effectiveness and efficiency of MISA's organisational structure, processes and systems to determine whether all the necessary service delivery enablers are in place to support delivery processes in an optimum and accountable manner.

4. OBJECTIVES

- 4.1 The key objective of the project is to appoint a service provider that will conduct an organisational functionality assessment to diagnose, based on evidence, the functionality, effectiveness and efficiency of MISA's organisational structure, processes and systems to determine whether all the necessary service delivery enablers are in place to support delivery processes in an optimum and accountable manner and make recommendation on strategies which:-
- 4.1.1 Promote organizational functionality, effectiveness and efficiency by deploying the best practices insofar as the organizational structure, and organizational processes & systems are concerned.
- 4.1.2 Will support organizational performance and productivity by utilizing resources optimally without overstretching them.
- 4.1.3 Enhance strategic alignment of the organization structure and organizational processes & systems for enhanced service delivery; and
- 4.1.4 Improve the MISA organizational structure's responsiveness to the mandate.
- 4.2 The successful bidder is expected to make available at least four (4) resources to be accessible to MISA employees virtually and/or face-to-face as and when required for the duration of services. The resources must possess organisational development skills and expertise in order to provide the required services.

5. SCOPE OF WORK

- 5.1 The successful bidder is expected to conduct an organisational functionality assessment in line with the DPSA OFA Tool to assess MISA's: -
- service delivery systems and capacity to deliver
 - functionality, effectiveness and efficiency of MISA's organisational structure, processes and systems to determine whether all the necessary service delivery enablers are in place to support delivery processes in an optimum and accountable manner
 - mandate, functions, decision-making processes, budget management and operating structure to determine alignment and relevance or responsiveness to service delivery
 - strategic and annual plan, and planning, governance & oversight processes operations management – operations strategy or approach, design, planning and control
 - performance and delivery sustainability

- 5.2 Make findings on MISA's functionality, efficiency and effectiveness.
- 5.3 Identify gaps, challenges and weaknesses which hinder MISA's capacity to deliver on its mandate fully and optimally thus hindering overall service delivery.
- 5.4 If the review of the organisational structure is necessary, recommend an appropriate organisational structure for MISA given its mandate, processes and systems.
- 5.5 Make recommendations on how to improve its functionality, efficiency and effectiveness.
- 5.6 Make recommendations on how to address the identified gaps, weaknesses and challenges.
- 5.7 The following services or tasks fall outside or are excluded from the scope of the organisational functionality assessment: -
 - Implementing recommendations made to improve MISA's functionality.
 - Directly measuring service user (municipalities) opinions.
 - Compliance assessment.

6. PROJECT OUTPUT AND OUTCOMES

- 6.1 Enhanced employee morale, productivity, and retention – there are currently constant complaints from employees that they are stretched and that the employees need to be increased. The assessment will determine if this is indeed the case or if rather MISA needs to enhance its processes and systems to improve productivity.
- 6.2 Improved organisational performance – the assessment is expected to identify any gaps and weaknesses as well as solutions to address these gaps & weaknesses which will in turn improve MISA's institutional performance.
- 6.3 Recommendations on the best way to achieve functionality, efficiency and effectiveness of the institution; and
- 6.4 Better alignment and responsiveness of the organisational structure – a better aligned structure will enhance productivity and in turn improve service delivery.

7. PROJECT MANAGEMENT

The MISA Project Manager is the Chief Director: Corporate Management Services, supported by Directorate: HRM&ODSS.

8. TECHNICAL PROPOSAL

Bidders must be able to provide detailed project plans/ proposal and be able to demonstrate programmes they have developed in relations to all aspects as mentioned above.

- 8.1 A company profile that highlights experience in providing organisational development services.
- 8.2 At least three client reference letters of similar projects undertaken by the company in a medium to large complex organisation. The reference letters must be on the

relevant company's letterhead, dated and clearly set out the details of the project undertaken by the bidder including the duration of the project.

- 8.3 Team leader curriculum vitae showing experience in Organisational Development services, as well as copies of a tertiary qualification in the field of Organisational Development.
- 8.4 Curriculum vitae of three (3) additional resources with relevant experience in Organisational Development and Design services, as well as copies of a tertiary qualification in the relevant field.
- 8.5 Project Methodology: Detailed approach that is best to deliver the intended services for the project with a clear scope definition and work breakdown, identification of tasks/activities, and for each of the activities/ deliverables as set out in the 'Scope of work', detailing at least the following:-
 - 8.5.1 The Service Provider's understanding of the project objectives highlighting the issues of importance and explaining the approach they will adopt to address them;
 - 8.5.2 The management method to be implemented during the project-planning phase (inception phase) to confirm major deliverables/milestone and acceptance criteria, as well as the project processes and responsibilities;
 - 8.5.3 Stakeholder (including possible interviewees) identification, ranking, management and reporting mechanism to be followed;
 - 8.5.4 Project implementation schedule clearly stating tasks to be undertaken, the deliverables for each task as well as the milestones and related timelines;
 - 8.5.5 Skills transfer schedule which clearly states the technical and soft skills to be transferred to MISA employees, the learning outcomes or milestones and training methods to be used; and
 - 8.5.6 Project risks clearly showing the depth and clarity of the stakeholder's understanding of risks associated with the program.

9. FINANCIAL PROPOSAL

- 9.1 Complete the pricing schedule in SBD 3.3 attached below
- 9.2 The pricing schedule must include all costs involved including but not limited to, costs for specialists, logistical costs and the bidder must indicate discount price, and any special conditions attached to the discount and price offer where applicable.

10. EVALUATION CRITERIA

The bid will be evaluated in three stages, namely Mandatory requirements, Functionality, Price and specific goals.

10.1 STAGE 1 –MANDATORY REQUIREMENTS

NB: Failure to comply with the following will result in disqualification of bids for further evaluation:

No.	Item/description	Yes/No
10.1.1	Pricing schedule must be fully completed and signed.	
10.1.2	Pricing schedule and or Total tender amount shall not contain correction fluid on them. Any wrong entry, in case of correction, must be cancelled by a single stroke and initialled by the Authorised signatory.	
10.1.3	A bidder submitting as a Joint Venture, consortium or partnership must submit a JV, consortium or partnership agreement clearly setting out each partner's role.	
10.1.4	Attendance of compulsory hybrid briefing session.	

10.2 STAGE 2 - FUNCTIONALITY

The following criteria and weights will be applied when bids are evaluated on functionality:

	REQUIRED COMPETENCIES	POINTS												
1.	Company Experience: A minimum of five (5) years' experience is required in providing Organisational Development services with minimum three (3) relevant projects handled supported by at least 3 reference letters from contactable and verifiable references on the company's letterhead showing the period of the contract. Experience: <table><tr><td>Less than 5 years</td><td>= 0</td></tr><tr><td>5 years</td><td>= 5</td></tr><tr><td>Above 5 years</td><td>= 10</td></tr></table> Projects: <table><tr><td>Less than 3 projects</td><td>= 0</td></tr><tr><td>Between 3 and 5 projects</td><td>= 5</td></tr><tr><td>More than 5 projects</td><td>= 10</td></tr></table>	Less than 5 years	= 0	5 years	= 5	Above 5 years	= 10	Less than 3 projects	= 0	Between 3 and 5 projects	= 5	More than 5 projects	= 10	20
Less than 5 years	= 0													
5 years	= 5													
Above 5 years	= 10													
Less than 3 projects	= 0													
Between 3 and 5 projects	= 5													
More than 5 projects	= 10													

2.	Team Leader	
	Qualification Degree / Honours Degree / Post Graduate Diploma / master's degree in the field of Organisational Development qualification at NQF level 7 - Degree / B- Tech = 1 points - Honours Degree = 3 points - Master's degree and above = 5 points	5
	Experience No. of years post qualification experience in Organisational Development at managerial level: 6 years = 5 points > 6 -10 years = 7 points >10 = 10 points	10
3.	Resource 1	
	Qualifications National Diploma / Degree / Honours Degree / master's degree in Organisational Development at NQF level 6. - National Diploma = 1 points - Degree/BTech = 3 points - Postgraduate Degree = 5 points	5
	Experience No. of years post qualification experience in Organisational Development at middle management level: 4 years = 3 points >4 - 5 years = 5 points >5 - 6 years = 7 points > 6 years = 10 points	10
4.	Resource 2	
	Qualifications National Diploma / Degree / Honours Degree / master's degree in Organisational Development qualification at NQF level 6. - National Diploma = 1 points - Degree/BTech = 3 points - Postgraduate Degree = 5 points	5
	Experience No. of years post qualification experience in Organisational Development at middle management level: 4 years = 3 points >4 - 5 years = 5 points >5 - 6 years = 7 points > 6 years = 10 points	10
5.	Resource 3	
	Qualifications National Diploma / Degree / Honours Degree / master's degree in Organisational Development qualification at NQF level 6. - National Diploma = 1 points - Degree/BTech = 3 points	5

	Postgraduate Degree = 5 points	
	Experience No. of years post qualification experience in Organisational Development at middle management level: 4 years = 3 points >4 - 5 years = 5 points >5 - 6 years = 7 points > 6 years = 10 points	10
6.	Project Proposal: • Scope Management (clear scope definition and work breakdown) = 3 points • Time Management (defining and sequencing tasks/activities, set deadlines for each task and recovery plans where schedule not followed) = 3 • Quality Management (quality assurance and quality management plan) = 2 points • Risk Management (identify and assess at least 3 risks inherent in the project, and develop mitigation plan) = 5 points • Stakeholder Management (identify, analyse, sequence/rank and map stakeholders in terms of their power and influence, and develop a stakeholder management plan) = 5 points • Skills transfer schedule which clearly states the technical and soft skills to be transferred to MISA employees, the learning outcomes or milestones and training methods to be used = (2)	20
	TOTAL =	100

*NB: Bidders must score a minimum of **70 points** on functionality to go through to price and specific goals (Stage 3).*

10.3 STAGE 3 - PRICE AND SPECIFIC GOALS

The **80/20 preference point system** Shall be applied for the purposes of this bid as per the requirements of the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000) and PPPFA Regulations of 2022.

The 80/20 preference point system for acquisition of services, works or goods up to Rand value of R50 million:

PREFERENCE POINT SYSTEM

Criteria	Points
POINTS ON PRICE	80
SPECIFIC GOALS	20
TOTAL	100

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

80/20

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

Where:

Ps = Points scored for price of tender under consideration
 Pt = Price of tender under consideration
 Pmin = Price of lowest acceptable tender

Points claimed will be according to bidder's specific goals as indicated in Table below:

Specific goals for the tender and points claimed are indicated per table below:

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system) (To be completed by the organ of state)
Who are women	7
Who are youth	7
B-BBEE status level contributors from level 1 to 2 which are QSE or EME	6
Total scored points	20

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

Documents required for verification of points allocation are as follows:

Table 5: Specific Goals Requirements

Procurement Requirement	Required Proof Documents
Women	Full CSD Report
Youth	Full CSD Report
B-BBEE status level contributors from level 1 to 2 which are QSE or EME	Valid certificate/ sworn affidavit Consolidated BEE certificate in cases of Joint Venture Full CSD Report

11. MISA'S RIGHTS

- 11.1 MISA reserves the right to cancel this bid in whole or in part, at its sole discretion, at any time before the Agreement is fully executed.
- 11.2 This Bid does not commit MISA to award an Agreement, to pay any costs incurred by bidders in the preparation of their proposals submitted in response to this Bid, or to procure or contract for services.
- 11.3 MISA reserves the right to conduct vetting and verify the validity of all certificates submitted by bidders.
- 11.4. MISA will reject any proposal as non-responsive that does not provide evidence of the specified mandatory requirements. MISA may or may not request additional information and clarification during the evaluation process from any or all bidders regarding their proposals.
- 11.5 MISA reserves the right to request the company's latest audited financial statement to ascertain financial stability of the bidder prior to the award of the bid.

12. REPORTING

- 12.1. The appointed bidder will report to the appointed Project Manager of MISA. The detailed reporting requirements will be provided to the successful bidder during the contract negotiation and project inception.
- 12.2. The bidder must submit a written report to the MISA Project Manager on specific problems, recommendations, improvement methods, work programmes, personnel turnover, tenants' complaints, remedial actions taken and all other matter relating to provision of security services.

13. PAYMENTS

MISA does not pay any amount in advance. Only original signed invoices must be submitted for payments. The bidder will be paid within **30** days after receipt of valid invoice, when the services have been fully rendered to the satisfaction of MISA, and this done by means of electronic transfer directly into the bidder's bank account.

14. SUBMISSION OF PROPOSALS

Tender Documents are not for sale and will also not be emailed to bidders. The Tender Documents **must** also include a soft copy (Memory Stick - all in PDF Format) of the proposal, and to reach MISA offices before **11:00 on the 15th of September 2026** and must be enclosed in a sealed envelope clearly inscribed on the outside:

BID REFERENCE NUMBER: MISA/CMS/OFA/014/2026/2027

CLOSING DATE AND TIME: 15 September 2026 @ 11h00

15. PERIOD FOR ACCEPTANCE OF PROPOSALS

To allow for adequate evaluation, MISA requires a response to this bid to be valid and irrevocable for 90 days after closing date and time.

16. COMMUNICATION WITH MISA OFFICIALS

Bidders and their representatives may not communicate with MISA officials except in writing. Bidders and their representatives must communicate in the manner set forth in this Bid. There shall be no communication with MISA officials except as may be reasonably necessary to carry out the procedures specified in this Bid. Nothing herein prohibits bidders and their representatives from making oral statements or presentations in public to one or more MISA officials during a public meeting.

17. CONFIDENTIALITY

All responses to this Bid become property of MISA and submissions after closing of bid may be subject to public inspection and disclosure in accordance with the MISA SCM Policy and provisions of applicable legislation.

18. QUESTIONS AND REQUESTS FOR CLARIFICATIONS

Bidders must carefully examine the bid documents and in the event of doubt of anything contained in the documents. All enquiries should be made at the briefing session and can also be made in writing seven (7) working days before the closing date of the Bid to: tenders@misa.gov.za

PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE MISA					
BID NUMBER:	MISA/CMS/OFA/014/2026/2027	CLOSING DATE:	15 September 2026	CLOSING TIME:	11:00
DESCRIPTION	APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT AN ORGANISATIONAL FUNCTIONALITY ASSESSMENT TO EVALUATE THE FUNCTIONALITY, EFFECTIVENESS AND EFFICIENCY OF MISA AS WELL AS THE RESPONSIVENESS OF THE ORGANISATIONAL STRUCTURE TO ITS MANDATE				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
Tender documents are to be submitted to MISA Reception and deposited in the tender box at MISA Offices, Letaba House, 1303 Heuwel Road, Riverside Office Park, Centurion, 0046.					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Ms Mandy Batyi	CONTACT PERSON	Ms Refilwe Mathabathe		
TELEPHONE NUMBER		TELEPHONE NUMBER			
FACSIMILE NUMBER		FACSIMILE NUMBER			
E-MAIL ADDRESS	tenders@misa.gov.za	E-MAIL ADDRESS	tenders@misa.gov.za		
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] ☐ Yes ☐ No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		TICK APPLICABLE BOX] ☐ Yes ☐ No
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]					
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	☐ Yes ☐ No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?		☐ Yes ☐ No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS					
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?				☐ YES ☐ NO	
DOES THE ENTITY HAVE A BRANCH IN THE RSA?				☐ YES ☐ NO	
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?				☐ YES ☐ NO	
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?				☐ YES ☐ NO	
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?				☐ YES ☐ NO	
IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.					

PART B TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:	
1.1.	BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
1.2.	ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.
1.3.	THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
1.4.	THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).
2. TAX COMPLIANCE REQUIREMENTS	
2.1	BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
2.2	BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
2.3	APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
2.4	BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
2.5	IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
2.6	WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
2.7	NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

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

SIGNATURE OF BIDDER:

CAPACITY UNDER WHICH THIS BID IS SIGNED:
(Proof of authority must be submitted e.g. company resolution)

DATE:

PRICING SCHEDULE
(Professional Services)

NAME OF BIDDER:	BID NO.:
CLOSING TIME 11:00	CLOSING DATE :

OFFER TO BE VALID FOR ...90 DAYS FROM THE CLOSING DATE OF BID.

ITEM CURRENCY NO INCLUDED)	DESCRIPTION	BID PRICE IN RSA **(ALL APPLICABLE TAXES
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1. The accompanying information must be used for the formulation of proposals.
2. Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project.

3. RATES APPLICABLE (CERTIFIED INVOICES MUST BE RENDERED IN TERMS HEREOF)

Item	Deliverables Description	Rate in Rands	Total Price
1.	Initiation and Inception (10%)		
2.	Information/data Gathering (20%)		
3.	Information/data Analysis (35%)		
4.	Reporting (30%)		
5.	Close Out (5%)		
6.	Total excl VAT		R.....
7.	VAT		R.....
8.	TOTAL BID/TENDER AMOUNT INCLUSIVE OF VAT AND OTHER COSTS		R.....

SIGNATURE OF THE BIDDER

SERVICE PROVIDER'S DISCLOSURE

1. PURPOSE OF THE FORM

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

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

2. Service Provider's declaration.

- 2.1 Is the Service Provider, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise,

employed by the state?

YES/NO

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

Full Name	Identity Number	Name of State institution

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

- 2.2.1 If so, furnish particulars:

.....

¹ the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

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

2.3.1 If so, furnish particulars:

.....
.....

3 DECLARATION

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

3.1 I have read and I understand the contents of this disclosure;

3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;

3.3 The Service Provider has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.

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

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

3.5 There have been no consultations, communications, agreements or arrangements made by the Service Provider with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the Service Provider was not involved in the drafting of the specifications or terms of reference for this bid.

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

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

exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

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

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

.....

Signature

.....

Date

.....

Position

.....

Name of Service Provider

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

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

NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022

1. GENERAL CONDITIONS

- 1.1 The following preference point systems are applicable to invitations to tender:
- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and

1.2 **To be completed by the organ of state**

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

- 1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:
- (a) Price; and
 - (b) Specific Goals.

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

The maximum points for this tender are allocated as follows:

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

- 1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.
- 1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive

tendering process or any other method envisaged in legislation;

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

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

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

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

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

Where

P_s = Points scored for price of tender under consideration
 P_t = Price of tender under consideration
 P_{min} = Price of lowest acceptable tender

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

3.2.1. POINTS AWARDED FOR PRICE

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

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

Where

P_s = Points scored for price of tender under consideration
 P_t = Price of tender under consideration
 P_{max} = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
 - (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,
- then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

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

(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.)

Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)

The specific goals allocated points in terms of this bid	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the bidder)
Who are women (51% or more)	7	
Who are youth	7	
B-BBBEE status level contributors from level 1 to 2 which are QSE or EME	6	
Total scored points	20	

the specific goals may include—

- a) contracting with persons, or categories of persons, historically disadvantaged by unfair discrimination on the basis of race, gender or disability.
- b) Implementing the programmes of the Reconstruction and Development Programme as published in Government Gazette No. 16085 dated 23 November 1994.

Means of Verification (Specific Goals)

Procurement Requirement	Required Proof Documents
Women	Full CSD Report
B-BBEE status level contributors from level 1 to 2 which are QSE or EME	Valid certificate/ sworn affidavit Consolidated BEE certificate in cases of Joint Venture Full CSD Report

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

DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name of company/firm.....

4.4. Company registration number:

4.5. TYPE OF COMPANY/ FIRM

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

[TICK APPLICABLE BOX]

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 - (a) disqualify the person from the tendering process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;

- (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
- (e) forward the matter for criminal prosecution, if deemed necessary.

.....	
SIGNATURE(S) OF TENDERER(S)	
SURNAME AND NAME:	
DATE:	
ADDRESS:	
	
	
	