



**BID NO: RFP 08/21
REQUEST FOR PROPOSALS:**

**APPOINTMENT OF A SERVICE PROVIDER FOR PROVISION AND IMPLEMENTATION OF A
RASET PORTAL SOLUTION FOR ITHALA DEVELOPMENT FINANCE CORPORATION LIMITED
(IDFC)**

CLOSING DATE: 05 October 2021 at 11:00 am

Issued by:

Ithala Development Finance Corporation Limited
29 Canal Quay Road (for GPS 29 Signal Road),
Point Waterfront
Durban

Procurement Enquires:

Supply Chain Management Unit
Email: tenders@ithala.co.za

Name of Bidder:

B-BBEE Status Contributor Level:

In terms of Regulation 4 of the Preferential Procurement Regulations of 2017, Ithala will be applying pre-qualification criteria to advance designated groups.

Only bidders with a B-BBEE Status of Level 1 Contributor are eligible to submit a bid

The following designated groups with the requisite experience are encouraged to participate in this Bid process

- Black People
- Women
- Youth
- People with Disabilities

For any complaints regarding our supply chain management abuses please contact Larissa Warren at 031 907 8610 or email Complaints@ithala.co.za alternatively you can lodge an anonymous complaint at our toll-free hotline number 0800 0048 23

REQUEST FOR PROPOSAL

**ITHALA DEVELOPMENT FINANCE CORPORATION LIMITED, 29 CANAL QUAY ROAD, POINT,
DURBAN (FOR GPRS 29 SIGNAL ROAD)** (Hereinafter referred to as ("Ithala"))

BID NUMBER: **RFP 08/21**

CLOSING DATE: **05 October 2021**

TIME: **11:00am**

DESCRIPTION: **APPOINTMENT OF A SERVICE PROVIDER FOR THE
IMPLEMENTATION OF A RASET PORTAL SOLUTION**

**NON-
COMPULSORY
BRIEFING:**

Yes

X

No

DATE:	23 September 2021 at 12:00pm
VENUE:	Online session
DETAILS:	Kindly register your interest for the online session by sending an email request to tenders@ithala.co.za . The email should include your company name, contact person, telephone number and the meeting link will then be sent to you.
TELEPHONE:	031 907 8911

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C.1 TENDER NOTICE AND INVITATION TO TENDER

Ithala Development Finance Corporation Limited seeks to appoint a service provider for the implementation of the RASET Portal solution.

The physical address for collection of tender document is:

Ithala Trade Centre

29 Canal Quay Road, Point Waterfront, Durban

Submission:

One original and one soft (USB) copy of the bid document must be submitted,,

The proposals shall be submitted in sealed envelopes delivered at Ithala Trade Centre, 29 Canal Quay Road (for GPS use 29 Signal Road), Point, Durban and should be deposited in the box located at the reception. The closing time for receipt of tenders is **05 October 2021 @11h00**.

Telegraphic, telephonic, telex, facsimile, e-mail and late tenders will not be accepted. It is important to note that all bids lodged will be examined to determine compliance with the bidding requirements and conditions. Bids with obvious deviation from the requirements, will be eliminated.

Technical and administrative queries relating to these documents may be addressed in writing only quoting the Bid No. for attention: Supply Chain Management Unit by email to tenders@ithala.co.za Tenders may only be submitted on the original tender documentation that is issued by Ithala written in black ink.

Ithala does not bind itself to accept the lowest or any bid and consider any bid for appointment.

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF ITHALA DEVELOPMENT FINANCE CORPORATION							
BID NUMBER:	RFP 08/21	CLOSING DATE: 05 October 2021			CLOSING TIME:	11H00pm	
DESCRIPTION	APPOINTMENT OF A SERVICE PROVIDER FOR THE IMPLEMENTATION OF A RASET PORTAL SOLUTION FOR ITHALA DEVELOPMENT FINANCE CORPORATION LIMITED (IDFC)						
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT :							
Ithala Trade Centre							
29 Canal Quay Road							
Point Water Front							
Durban							
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO				TECHNICAL ENQUIRIES MAY BE DIRECTED TO:			
CONTACT PERSON	Charmaine Noble			CONTACT PERSON	Nomthi B Zulu		
TELEPHONE NUMBER	031 907 8703			TELEPHONE NUMBER	031 907 8776		
E-MAIL ADDRESS	cnoble@ithala.co.za			E-MAIL ADDRESS	NBzulu@ithala.co.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
- 2.4 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
- 2.5 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
- 2.6 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."

SIGNATURE OF BIDDER:

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

DATE:

Ithala does not bind itself to accept the lowest or any bid and consider any bid for appointment

All bidders must furnish the following particulars and include it in their submission (returnable documents)

Name of bidder:

Trading name

Company registration number

VAT registration
number

Workman's compensation number

Tax Clearance
Certificate /CSD Report
submitted
.....

Postal address:

Street address:

Telephone number: Code Number

Cellular number:

Facsimile number: Code Number

e-Mail address:

In case of a consortium/joint venture, full details on consortium/joint venture members:

Entity name	VAT registration number	Tax Clearance Certificate submitted	YES / NO
.....			

Entity name	_____	VAT registration number	_____	Tax Clearance Certificate submitted	YES / NO
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Entity name	_____	VAT registration number	_____	Tax Clearance Certificate submitted	YES / NO
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Name of contracting entity in case of a consortium/joint venture

Entity name: _____

Postal address: _____

Street address: _____

Contact details of responsible person who will act on behalf of the entity/consortium/joint venture for this bid

Name and Surname _____

Telephone number: Code _____ Number _____

Cellular number: _____

Facsimile number: Code _____ Number _____

e-Mail address: _____

Contact details of alternative responsible person who will act on behalf of the person above should he/she not be available

Name and Surname _____

Telephone number: Code _____ Number _____

Cellular number: _____

Facsimile number: Code _____ Number _____

e-Mail address: _____

Confirmation

Are you the accredited representative in South Africa for the services offered by you: YES / NO

Declaration

I/We have examined the information provided in this bid documents and offer to undertake the work prescribed in accordance with the requirements as set out in the bid document. The prices quoted in this bid are valid for the stipulated period. I/We confirm the availability of the proposed team members. We confirm that this bid will remain binding upon us and may be accepted by you at any time before the expiry date.

Are you duly authorised to commit the bidder: YES / NO

SIGNATURE:of person authorised to sign the tender)

C.2 INTRODUCTION

Ithala is a Development Finance Corporation operating within the confines of the KZN Ithala Development Finance Corporation Act, No 5 of 2013.

Our VISION is “To be the catalyst for growth, economic development and empowerment” and our MISSION is “To drive economic development and empowerment whilst remaining financially sustainable”.

We enable, develop, promote and implement innovative investment and transformation solutions to advance sustainable Black Economic Empowerment.

The objectives of Ithala are to promote, support and facilitate social and economic development in the Province of Kwa-Zulu Natal (KZN) by:

1. Mobilising financial resources and providing financial and supportive services to persons domiciled, ordinary resident, or carrying on business within the KZN Province
2. Planning, executing, financing and monitoring the implementation of development projects and programmes in the province of KZN
3. Promoting, assisting and encouraging the development of the Province’s human resources and its social, economic, financial and physical infrastructure
4. Promoting, encouraging and facilitating private sector investment in the Province and the participation of the private sector and community organisations in development projects and programmes and in contributing to economic growth and development generally
5. Acting as the Government’s agent for performing any development related tasks and responsibilities that the government considers may be more effectively performed by a corporate entity

Our primary mandate is implemented by our two operating divisions and a subsidiary with an external market focus, namely:

1. Properties
2. Business Finance
3. Ithala SOC Limited

The quality, price and service that we provide our customers can only be as good as what we receive from our service providers.

We strive for continuous improvement in our critical business areas and seek to establish relationships with suppliers that are equally passionate in their quest for better quality, price and service. By exceeding our requirements and expectations, you will not only ensure that you maintain the current business; you will be positioning yourself for future business within Ithala.

PROCUREMENT PHILOSOPHY

It is the policy of Ithala, when purchasing goods and obtaining services, to follow a course of optimum value and efficiency by adopting best purchasing practices in supply chain management, ensuring that open and fair competition has prevailed, with due regard being had to the importance of:

- a) The promotion, development and support of businesses from disadvantaged communities (small, medium, micro enterprises, as well as established businesses within those communities) in terms of its BBBEE Policy.
- b) The promotion of national and regional local suppliers and agents before considering overseas suppliers; and
- c) The development, promotion and support for the moral values that underpin the above, in terms of Ithala's Business Ethics and Guidelines which requires that all commercial conduct be based on ethical and moral values and sound business practice. This value system governs all commercial behaviour within Ithala.

C3 CONDITIONS OF BID AND CONTRACT

		Confirmation			
Conditions		Yes	No	Noted	If no, indicate deviation
1.	GUIDELINE ON COMPLETION				
1.1	Bidders must indicate compliance or non-compliance on a paragraph-by-paragraph basis. Indicate compliance with the relevant bid requirements by marking the YES box and non-compliance by marking the NO box. If the contents of the paragraph only need to be noted, please mark the NOTED box. The bidder must clearly state if a deviation from these requirements are offered and the reason therefore. If an explanatory note is provided, the paragraph reference must be attached as an appendix to the bid submission. Bids not completed in the manner prescribed may be considered incomplete and rejected. Should bidders fail to indicate agreement/compliance or otherwise, Ithala will assume that the bidder is not in compliance or agreement with the statement(s) as specified in this bid.				
2.	CONTRACT AGREEMENT				
2.1	The Ithala Service Level Agreement will be the only contract signed by both parties and will form the basis of this contract. Ithala's standard terms and conditions will not be negotiated. This application requires an MSA, SLA & SOW				
3.	ADDITIONAL INFORMATION REQUIREMENTS				
3.1	During evaluation of the bids, additional information may be requested in writing from bidders. Replies to such request must be submitted, within 5 (five) working days or as otherwise indicated. Failure to comply, may lead to the bid being disregarded.				

4.	CONFIDENTIALITY	Yes	No	Noted	If no, indicate deviation
4.1	The bid and all information in connection therewith shall be held in strict confidence by bidders and usage of such information shall be limited to the preparation of the bid.				
4.2	All bidders are bound by a confidentially agreement preventing the unauthorised disclosure of any information regarding Ithala or of its activities to any other organisation or individual. The bidders may not disclose any information, documentation or products to other clients without written approval of the accounting authority or the delegate.				
5.	INTELLECTUAL PROPERTY, INVENTIONS AND COPYRIGHT				
5.1	Copyright of all documentation relating to this assignment belongs to Ithala. The successful bidders may not disclose any information, documentation or products to other clients without the written approval of the accounting authority or the delegate.				
5.2	All the intellectual property rights arising from the execution of this Agreement shall vest in Ithala and the service provider undertakes to honour such intellectual property rights and all future rights by keeping the know-how and all published and unpublished material confidential.				
5.3	In the event that the service provider would like to use any information or data generated in terms of the Services, the prior written permission must be obtained from Ithala.				
5.4	Ithala shall own all materials produced by the service provider during the course of, or as part of the Services including without limitation, deliverables, computer programmes (source code and object code), programming aids and tools, documentation, reports, data, designs, concepts, know-how and other information whether capable of being copyrighted or not ("IP") which IP Ithala shall be				

	entitled to freely cede and assign to parties nominated by Ithala.				
6	PAYMENTS	Yes	No	Noted	If no, indicate deviation
6.1	Ithala will pay the service provider for the actual services rendered in line with the contract. Ithala reserves the right to revise the number of guards based on monthly site requirements. No additional amounts will be payable by Ithala to the contractor.				
6.2	The service provider shall from time to time during the duration of the contract, invoice Ithala for the services rendered. No payment will be made to the service provider unless an invoice complying with section 20 of VAT Act No 89 of 1991 has been submitted to Ithala.				
6.3	Payment shall be made into the bidder's bank account or per cheque payment normally 30 days after receipt of an acceptable, valid invoice. (Banking details must be submitted as soon as this bid is awarded).				
7	NON-COMPLIANCE WITH DELIVERY TERMS				
7.1	As soon as it becomes known to the service provider that he will not be able to deliver the goods/services within the delivery period and/or against the quoted price and/or as specified, Ithala must be given immediate written notice to this effect. Ithala reserves the right to implement remedies as provided for in the service level agreement to be entered into with service provider.				
8	WARRANTIES				
8.1	The service provider warranties that:				

	It is able to conclude this Agreement to the satisfaction of Ithala.				
8.2	Although the service provider will be entitled to provide services to persons other than Ithala, the service provider shall not without the prior written consent of Ithala, be involved in any manner whatsoever, directly or indirectly, in any business or venture which competes or conflicts with the obligations of the contractor to provide the Services.				
9.	PARTIES NOT AFFECTED BY WAIVER OR BREACHES	Yes	No	Noted	If no, indicate deviation
9.1	The waiver (whether express or implied) by any Party of any breach of the terms or conditions of this Agreement by the other Party shall not prejudice any remedy of the waiving party in respect of any continuing or other breach of the terms and conditions hereof				
9.2	No favour, delay, relaxation or indulgence on the part of any Party in exercising any power or right conferred on such Party in terms of this Agreement shall operate as a waiver of such power or right nor shall any single or partial exercise of any such power or right under this Agreement.				
10	SUBMITTING BIDS				
10.1	Supply Chain Management (SCM)				
10.2	An original and electronic copy must be delivered to: ITHALA TRADE CENTRE 29 Canal Quay Road Point Waterfront, Durban At foyer in the Bid box Closing date: 05 October 2021 at 11h00am				
11	LATE BIDS				

11.1	Late submissions will not be accepted. A submission will be considered late if it arrived one second after 11:00 or any time thereafter. The bid (tender) box shall be locked at exactly 11:00 and bids arriving late will not be accepted under any circumstances. Bidders are therefore strongly advised to ensure that bids be dispatched allowing enough time for any unforeseen events that may delay the delivery of the bid.				
12.	BRIEFING SESSIONS AND CLARIFICATIONS				
12.1	Online session on 23 September 2021 at 12:00				
12.1.1	Any clarification required by a bidder regarding the meaning or interpretation of the Terms of Reference, or any other aspect concerning the bid, is to be requested in writing (letter, facsimile or e-mail). Please make reference to Tender Notice and Invitation to Tender page of this bid pack for contact details. The bid number should be mentioned in all correspondence. Telephonic requests for clarification will not be accepted. If appropriate, the clarifying information will be made available to all bidders by e-mail only.				
13.	FORMAT OF BIDS	Yes	No	Noted	If no, indicate deviation
13.1	Bidders must complete all the necessary bid documents and undertakings required in this bid document. Bidders are advised that their proposal should be concise, written in plain English and simply presented.				
13.2	Bidders are to set out their proposal in the following format:				
13.2.1	Part 1: Invitation to Bid & Introduction				
13.2.2	Part 2: RFP Summary and Details & Official Briefing Session Certificate of attendance				
13.2.3	Part 3: Compliance to Special Conditions of Bid and Noting of Evaluation Criteria				
13.2.4	Part 4: National Treasury CSD report				
13.2.5	Part 5: Declaration of interest Certificate Of Independent Bid Determination Declaration				

	of Bidder's Past SCM Practices Certificate of Authority to Sign a Bid				
13.2.6	Part 6: BBEE				
13.2.7	Part 7: Technical/Functionality Proposal				
13.2.8	Part 8: Deviations from Request for Bid				
13.2.9	Part 9: Pricing Schedule				
13.2.10	Part 10: Procurement Timelines				
13.2.11	Part 11: Terms of Reference				
13.2.12	Part 12: Annexures				
14.1	PART 1: INVITATION TO BID (FORM C1)				
14.2	PART 2: PART 2: RFP SUMMARY AND DETAILS & OFFICIAL BRIEFING SESSION CERTIFICATE OF ATTENDANCE (FORM C5 & C16)				
	Bidders must complete the table and sign the Certificate of attendance. The briefing session needs to be completed by Individuals attending a briefing session on behalf of a bidder as well as Ithala representative. Bid summary must be completed and indicate what returnable documents will be submitted.				
14.3	PART 3: COMPLIANCE TO SPECIAL CONDITIONS OF BID AND NOTING OF EVALUATION CRITERIA (FORM C3)	Yes	No	Noted	If no, indicate deviation
	Bidders must complete C3. Indicating compliance/non-compliance or noted. In case of non-compliance details and referencing to the specific paragraph is required.				
14.4	PART 4: SARS TAX CLEARANCE CERTIFICATE (FORM C10)				
	The bidder must be compliance with SARS and such information will be verified with Central Supplier Database (CSD). In case of a consortium/ joint venture, or where sub-contractors are utilised, each consortium/ joint venture member and/or sub-contractor (individual) must be in compliance with SARS and the information will be verified on Central Supplier Database (CSD).				

14.5	<u>PART 5: (FORM C4, C11, C12 AND C13)</u> Certificate of Authority to Sign a Bid Declaration of Interest Declaration of Bidder's Past SCM Practices & Certificate Of Independent Bid Determination				
14.5.1	Bidders must complete and submit the Declaration forms. A bidder must complete the relevant part of the document and it must indicate who is delegated to communicate or deal with Ithala. Any other irrelevant sections to the tendering entity must be marked 'N/A'.				
14.5.2	Bidders must submit a B-BBEE Verification Certificate from a Verification Agency accredited by the South African Accreditation System (SANAS) or a Registered Auditor approved by the Independent Regulatory Board of Auditors (IRBA) or an Accounting Officer as contemplated in the Close Corporation Act (CCA)				
14.5.3	For a consortium or joint venture: A trust, consortium or joint venture, will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their B-BBEE status level certificate. A trust, consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid				
14.6	PART 6: JOINT VENTURE/CONSORTIUM AGREEMENT (FORM C4)				
14.6.1	A copy of the joint venture/consortium agreement must be included.				
14.7	PART 7: TECHNICAL PROPOSAL/FUNCTIONALITY PROPOSAL (FORM C9)				
14.7.1	Bidders must, at least:				

14.7.1.1	Describe, in detail, exactly how they propose to carry out the activities to achieve the outcomes identified in the terms of reference. They should identify any possible problems that might hinder delivery and indicate how they will avoid, or overcome such problems.				
14.7.2	The bidder must confirm, by providing letters of reference including contact details, for the previous, current or ongoing projects of similar nature. This will be verified by Ithala.				
14.7.3	The proposal of the bidders should be detailed to the bidders understanding of the scope of work and outline the proposed methodology approach and plan.				
14.8	PART 8: DEVIATIONS FROM REQUEST FOR BID (FORM C15)				
14.8.1	Please indicate deviations or modifications to this Request for Bid on form C15				
14.8.2	If no deviations are required, please mark the form "Nil" and sign				
14.9	PART 9: PRICING SCHEDULE (FORM C8)				
14.9.1	Any budget amount that may be indicated in this document shall be deemed to be a guide only and bidders are expected to submit a costing that is fair and reasonable.	Yes	No	Noted	If no, indicate deviation
14.9.2	A proposed pricing schedule with one of the specified elements (fees and reimbursable costs) omitted from the costing, may be considered non-responsive.				
14.10	PART 10: PROCUREMENT TIMELINES (FORM C6)				
14.10.1	This part of a bid documents informs bidders when the bid process is expected to be finalised. It may not necessarily be followed.				
14.10.2	Terms of reference (TOR) are the requirements by Ithala. When a proposal is submitted, a bidder must				

	be certain that TOR are understood and has the capacity to offer a specified service.				
14.11	PART 11: ANNEXURES				
14.11.1	Bidder must insert all their additional annexures in part 11. This can include professional registrations, insurances etc.				
14.12	VAT				
14.12.1	Ithala is a VAT Vendor. Prices quoted must include VAT (where applicable).				
14.12.2	Ithala reserves the right to request the preferred bidder to register for VAT is the award is anticipated to be in excess of R1m for 12 consecutive months as the VAT Act requires.				
15	PRESENTATIONS				
15.1	Ithala reserves the right to invite bidders for presentations before the award of the bid.				
15.2	Presentation may affect the points awarded for functionality.				
15.3	If the date of the presentation meeting is not indicated in the bid document, at least three working days' notice will be given to bidders required to attend.				
16	NEGOTIATION	Yes	No	Noted	If no, indicate deviation
16.1	Ithala has the right to enter into negotiation with a prospective contractor regarding any terms and conditions, including price(s), of a proposed contract.				
16.2	Ithala shall not be obliged to accept the lowest or any financial offer or proposal. Furthermore, Ithala reserve the right not to award the tender to highest ranking bidder in terms of PPPFA.				

16.3	All bidders will be informed whether they have been successful or not. A contract will only be deemed to be concluded when reduced to writing in a contract form signed by the designated responsible person of both parties.				
17	DOMICILIUM				
17.1	The parties hereto choose <i>domicilium citandi et executandi</i> for all purposes of and in connection with the final contract as follows:				
	Ithala Development Finance Corporation Limited Ithala Trade Centre 29 Canal Quay Road (for GPS 29 Signal Road) Point Waterfront Durban				
18	COST OF BID PREPARATION				
18.1	Bidders shall prepare and submit a bid at their own expense.				
19.	SITE INSPECTIONS				
19.1	Ithala reserves the right to do site inspections of bidders to establish suitability of properties, vehicles, etc. to perform services effectively and efficiently				
20	BID VALIDITY PERIOD				
20.1	Bid will be valid for a period of 90 days				
20.2	Hold the tender offer(s) valid for acceptance by the employer at any time during the validity period stated in the tender data after the closing time stated in the tender data.				
20.3	If requested by the employer, consider extending the validity period stated in the tender data for an agreed additional period.				
21	ISSUE ADDENDA				
21.1	If necessary, issue addenda that may amend or amplify the tender documents to each tenderer during the period from the date that tender documents are available until seven days before the tender closing time stated in the Tender Data. If, as a result a				

	tenderer applies for an extension to the closing time stated in the Tender Data, the Employer may grant such extension and, shall then notify those tendering entities appearing on the attendance list				
21.2	Tenderers must sign the attendance list in the name of the tendering entity. Addenda will be issued to and tenders will be received only from those tendering entities appearing on the attendance list				
21.3	Acknowledge receipt of addenda to the tender documents, which the employer may issue.				
22	SUBMITTING OF FRAUDULENT DOCUMENTS				
22.1	Ithala will disregard the bid of any bidder if that bidder or any of its directors have abused the institution's supply chain management system and or committed fraud or any other improper conduct in relation to such system.				
22.2	Ithala will list bidders/ directors in the list of restricted suppliers and they will not conduct any business with an organ of state.				

C.4 CERTIFICATE OF AUTHORITY TO SIGN A BID

Indicate the status of the tenderer by ticking the appropriate box hereunder. The tenderer must complete the certificate set out below for the relevant category.

(I) COMPANY	(II) CLOSE CORPORATION	(III) PARTNERSHIP	(V) SOLE PROPRIETOR	(VI) JOINT VENTURES

i. CERTIFICATE FOR COMPANY

I,, chairperson of the Board of Directors of, hereby confirm that by resolution of the Board (copy attached) taken on 20....., Mr/Ms, acting in the capacity of, was authorised to sign all documents in connection with this tender and any contract resulting from it on behalf of the company.

Chairman:

As Witnesses:

Date:

ii.**CERTIFICATE FOR CLOSE CORPORATION**

We, the undersigned, being the key members in the business trading as.....

..... Hereby authorise Mr/Ms..... acting in the capacity of

....., to sign all documents in connection with the tender for

Contract No: and any contract resulting from it on our behalf.

NAME	ADDRESS	SIGNATURE	DATE

Note: This certificate is to be completed and signed by all of the key members upon whom rests the direction of the affairs of the Close Corporation as a whole.

iii. **CERTIFICATE FOR PARTNERSHIP**

We, the undersigned, being the key partners in the business trading as,.....
..... hereby authorize Mr/Ms.
acting in the capacity of, to sign all documents in
connection with the tender for Contract No and any contract resulting from it
on our behalf.

NAME	ADDRESS	SIGNATURE	DATE

Note: This certificate is to be completed and signed by all of the key partners upon whom rests the direction of the affairs of the Partnership as a whole.

iv. CERTIFICATE FOR SOLE PROPRIETOR

I,, hereby confirm that I am the sole owner of the
business trading

as.....

Signature of Sole owner:

As Witnesses:

1.....

2.....

Date:

v. CERTIFICATE OF AUTHORITY FOR JOINT VENTURES

This Returnable Schedule is to be completed by **EACH member** of a joint venture submitting a tender.

We, the undersigned, are submitting this tender offer in Joint Venture and hereby authorise Mr/Ms....., authorised signatory of the Company.....acting in the capacity of lead JV partner, to sign all documents in connection with the tender offer and any contract resulting from it on our behalf as a joint venture.

NAME OF JV ORGANIZATION.....

ADDRESS:
.....
.....

DULY AUTHORISED SIGNATORY NAME

DESIGNATION:

SIGNATURE

DATE:.....

C.5 CERTIFICATE OF ATTENDANCE AT COMPULSORY BRIEFING SESSION

This is to certify that (Company Name).....
of (address)
..... was represented by the person(s)
named below at the compulsory meeting held for all bidders at: -

Date	Time	Site
N/A		

I / We acknowledge that the purpose of the meeting was to acquaint myself / ourselves with the requirements and / or matters incidental to doing the work specified in the tender documents in order for me / us to take account of everything necessary when compiling our rates and prices included in the tender.

Bidder’s representative attending the meeting:

Name: Signature:
Capacity:

Confirmed by the Ithala’s representative:

Name: Signature:
Capacity:

C.6 PROCUREMENT TIMELINES

PROCUREMENT TIMELINE	DATE	TIME
RFP Release Date	13 September 2021	09h00
Non-compulsory online briefing session	23 September 2021	
Written questions of clarification – closing date	27 September 2021	16h00
Written response to all clarifications	29 September 2021	16h00
Service Provider Proposals Due	05 October 2021	11h00
Completion of Bid Evaluations	19 October 2021	16h00
Anticipated letter of Award	29 October 2021*	16h00
Commencement Date	01 November 2021*	09h00

***Indicative dates**

C.7 TERMS OF REFERENCE

1. PURPOSE

The purpose of this request for proposal (RFP08/21) is to solicit proposals from companies interested and able in development, implementation and customization of a Radical Agrarian Socio-Economic Transformation (RASET) Portal solution to be hosted on a cloud-based infrastructure.

2. BACKGROUND

RASET portal aims to improve the participation by small-scale farmers from historically underprivileged communities in the lucrative food production' value chain. The initiative endeavours to promote co-operation amongst various government departments, the private sector and pay point systems of government parastatal organisations with respect to the prioritization of black participants in the agribusiness industry to enable access to land and markets using the Government's food procurement purchasing power to give direct market access to small farmers and entrepreneurs. It will be achieved by quantifying and consolidating government demand from various departments and sourcing supply from previously disadvantaged individuals (PDI)'s using available technology for handling financial and logistical transactions in the most effective and efficient manner.

3. SCOPE OF SERVICES

The development, implementation and customization of the RASET Portal that will assist in implementing a multi-pronged strategy to build an effective agro food system for KwaZulu-Natal that provides food security and better life for all.

Bidders are expected to supply all required components of the RASET Portal solution. This is anticipated to consist of software, implementation services (including analysis, design, development, testing and deployment) and 48 months' post go-live support services.

The overall solution to include:

- Software and all required licenses or subscription fees;
- 48 months' solution support and maintenance services (second and third line support);
- Software implementation services, including software design and development services for all solution components;
- Training services including Skills Transfer; and
- Documentation.

RASET Programme Management Unit (PMU) will provide first line support services on-site. The second and third line support services will be provided onsite or remotely by the bidder at Ithala's discretion.

4. DELIVERABLES

Deliverables will include:

- **Software Solution and Licenses:** All software and annual licenses required to operate the solution. Software licenses will be required to support the following users and environments:
 - System administrators - 5
 - RASET Portal Users – 1500
 - Environments - 4 (Development, Test, Production and Failover)
- **Support and Maintenance Agreement:** Software technical support and maintenance agreements, providing Ithala with access to technical support staff, software bug fixes and service packs, and the right to future releases of software purchased.
- **Project Management Deliverables:** Work breakdown structure, task and dependency-driven project schedule, weekly status reports including risk and task progress updates, issues log, test scripts and results.
- **Training:** End user, administrator training, training materials and skills transfer.
- **System Documentation:** Comprehensive system documentation including infrastructure designs and System Administration Manuals.
- **Solution Configurations:** All configuration files and detailed documentation defining system, infrastructure and environment configurations.
- **Solution Implementation:** A tested and accepted solution implementation.
- **Support and Maintenance Agreement:** Software technical support and maintenance agreements, providing Ithala with access to technical support staff, software bug fixes and service packs, and the right to future releases of software purchased.
- **Hosting Agreement (as applicable):** Software and data hosting agreement specifying levels of service and SLA's, security, management, data centre infrastructure, etc.
- **Handover post contract.**

5. SCOPE OF WORK - STATEMENT OF REQUIREMENTS

Solution providers to respond with 'X' in the column that represents the current state of the solution in the Statement of Requirements table below

- SUP – Supported as delivered “out-of-the-box”
- MOD – Supported via modifications (screen configurations, reports, GUI tailoring, etc)
- 3RD – Supported via a third party solution
- CST – Supported via customisation (changes to source code)
- FUT – Will be supported in a future release
- NS – Not Supported
- Include comments where necessary to clarify how the solution meets the requirements.

5.1 Functionality Requirements

- Functionality Requirements – On boarding of DDA

Key Features/Functionality	Priority (0-10)		SUP	MOD	3RD	CST	FUT	NS	Comment
Functionality Requirements									
On-boarding of DDA									
Capability to capture DDA details	Essential	10							
Capability to upload supporting documents	Essential	10							
Capability to facilitate authorisation	Essential	10							
Capability to capture associated programmes	Essential	10							
Capability to edit DDA details	Required	6							
Capability to facilitate authorisation after edit	Essential	10							

- Functionality Requirements – On boarding of Farmers and Private Retailers

Key Features/Functionality	Priority (0-10)		SUP	MOD	3RD	CST	FUT	NS	Comment
On-boarding of Farmers and Private Retailers									
Capability to capture Farmer details	Essential	10							
Capability to upload supporting documents	Essential	10							
Capability to facilitate authorisation	Essential	10							
Capability to capture associated produce(s)	Essential	10							
Capability to edit Farmer details	Required	6							
Capability to facilitate authorisation after edit	Essential	10							

- Functionality Requirements – On boarding of Logistics (Transport) Partner

Key Features/Functionality	Priority (0-10)		SUP	MOD	3RD	CST	FUT	NS	Comment
On-boarding of Logistics (Transport) Partner									
Capability to capture Transport Partner details	Essential	10							
Capability to capture transport details	Essential	10							
Capability to upload supporting documents	Essential	10							
Capability to facilitate authorisation	Essential	10							
Capability to edit Farmer details	Required	6							
Capability to facilitate authorisation after edit	Essential	10							

- **Functionality Requirements – Demand Planning**

Key Features/Functionality	Priority (0-10)		SUP	MOD	3RD	CST	FUT	NS	Comment
Demand Planning									
Capability to select government department from pre-loaded list	Essential	10							
Capability to capture programme details	Essential	10							
Capability to capture programme budget	Essential	10							
Capability to capture programme menu description	Essential	10							
Capability to capture menu ingredient(s)	Essential	10							
Capability to capture ingredient(s) quantity	Essential	10							
Capability to select associated end user from pre-loaded list	Required	6							
Capability to capture requirement date	Essential	10							
Capability to select associated DDA from pre-loaded list	Essential	10							
Capability to identify appropriate Farmer(s) and/or Private Retailer(s) and generate order(s)	Essential	10							
Capability to email generated order(s) to Farmer(s) and/or Private Retailer(s)	Essential	10							
Capability to identify best routes for programme logistics	Essential	10							
Capability to identify appropriate Transport Partner(s) and generate order(s)	Essential	10							
Capability to email generated order(s) to Transport Partner(s)	Essential	10							

- Functionality Requirements – Supply Planning

Key Features/Functionality	Priority (0-10)		SUP	MOD	3RD	CST	FUT	NS	Comment
Supply Planning									
Capability for Farmer / Private Retailer to view order details	Essential	10							
Capability for Farmer/ Private Retailer to accept/ decline order as necessary	Essential	10							
Capability to confirm produce details	Essential	10							
Capability to confirm date of planting	Essential	10							
Capability to confirm date of delivery	Essential	10							
Capability to notify associated DDA of supply confirmation	Essential	10							
Capability to enable associated DDA to acknowledge produce supply confirmation	Essential	10							
Capability for Transport Partner to view order details	Essential	10							
Capability for Transport Partner to accept/ decline order as necessary	Essential	10							
Capability to confirm logistics details	Essential	10							
Capability to confirm pickup address	Essential	10							
Capability to confirm date of pickup	Essential	10							
Capability to confirm drop-off address	Essential	10							
Capability to confirm date of delivery	Essential	10							
Capability to notify associated DDA of supply confirmation	Essential	10							
Capability to enable associated DDA to acknowledge transportation supply confirmation	Essential	10							

- Functionality Requirements – Production Plan Management

Key Features/Functionality	Priority (0-10)		SUP	MOD	3RD	CST	FUT	NS	Comment
Production Plan Management									
Capability to frequently confirm all programme ingredients supply requirements are met	Essential	10							
Capability to identify gaps between supply and demand	Essential	10							
Capability to generate notifications re gaps between supply and demand	Essential	10							
Capability to identify impacted stakeholders to email notifications to	Essential	10							
Capability to call on demand planning process when gaps are identified	Essential	10							
Capability to call on supply planning process when gaps are identified	Essential	10							

- **Functionality Requirements – Logistics Management**

Key Features/Functionality	Priority (0-10)		SUP	MOD	3RD	CST	FUT	NS	Comment
Logistics Management									
Capability to frequently confirm all programme logistics requirements are met	Essential	10							
Capability to identify gaps between transport supply and demand	Essential	10							
Capability to generate notifications re gaps between transport supply and demand	Essential	10							
Capability to identify impacted stakeholders to email notifications to	Essential	10							
Capability to call on supply planning process when gaps are identified	Essential	10							
Capability to call on transport supply planning process when gaps are identified	Essential	10							

Capability to identify best routes for programme logistics	Essential	10							
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- Functionality Requirements – Reporting

Key Features/Functionality	Priority (0-10)		SUP	MOD	3RD	CST	FUT	NS	Comment
Reporting									
Capability to develop reports for programme sponsors	Essential	10							
Capability to develop dashboards to monitor production plans	Essential	10							
Capability to generate consolidated monthly and quarterly Reporting (MIS)	Required	6							
Ability to export data to Excel and PDF	Required	6							
Capability to print reports	Required	6							
Capability to email reports	Required	6							

- System Technical Requirements – User Access and Security

Key Features/Functionality	Priority (0-10)		SUP	MOD	3RD	CST	FUT	NS	Comment
System Technical Requirements									

User Access									
RASET Portal accessible securely via internet	Essential	10							
RASET Portal accessible securely via Mobile App	Essential	10							
RASET Portal accessible securely via a link from the following websites:									
EDTEA website	Essential	10							
Ithala website	Essential	10							
User access will need to be restricted according to specified profiles and user roles.	Essential	10							
Security									
Positive user Identification: Ensuring that each user has his/her own individual user id that is used on audit trails.	Essential	10							
Full password security	Essential	10							
Super user capable of setting up new users, authority levels, permission, etc.	Essential	10							
Levels of access and approvals to be determined and managed by RASET PMU	Required	6							
Force user password change (e.g. monthly) intervals and users to change password at any time	Required	6							
Force “new” users to change their password upon first login into the application	Essential	10							
Does the system provide audit trails on:									
Transactions	Essential	10							
Enquiries	Essential	10							
Masterfile / parameter changes	Essential	10							
Illegal logging-in attempts or at a level not allowed	Essential	10							
Transaction approval overrides	Essential	10							
Password standards (length, complexity, encryption, expiry) should comply with ISO17799									
Can the application be set to automatically lock a user’s account after a predetermined number of consecutive unsuccessful logon attempts	Required	6							

Prohibit users from logging into the application on more than one workstation at the same time with the same user ID	Required	6							
Can the application be set to automatically lock a user off the application after a predefined period of inactivity	Required	6							
Should have a comprehensive embedded audit routine									
Error identification / handling and reporting	Essential	10							
Segregation of duties with regards to initiation and approvals	Essential	10							

5.2 Interfaces Requirements

The following is a list of specific requirements, where Ithala would like to gain further insight from the respective bidder on how they are addressed in their proposed solution.

No	Topic	Description	Comply	Not Comply	Please support your answer with documented evidence on the bid proposal
1	Mandatory	System will need to integrate with JDE Edwards (ERP) for financial and procurement management.			
2.	Non-mandatory	System will need to integrate with MS SharePoint for documents and records management. Further details on this interface shall be clarified in the functional requirements specifications.			
		QlikView (Business Intelligence) BI tool in Ithala Group IT, will need to pull data from the RASET in order to create reports and dashboards necessary for decision making and operational efficiency.			

5.3 Cloud Based Hosting Environment

Ithala is looking for this system to be hosted on a cloud-based environment. Potential Service providers to recommend cloud-based hosting that will enable the RASET Portal solution to be accessed securely via internet, mobile app, and links from EDTEA and Ithala websites.

6. CONTRACT PERIOD

The contract period is five (05) years.

7. BIDDER PROPOSAL

The proposal from the bidder should include the following aspects that will required paper-based evaluation:

I. Company Profile

A detailed company profile focusing on areas of expertise specified in the request.

II. Resourcing

The bidder is required to provide detailed list of the team members, relevant skills and experience in implementing RASET Portal. The individuals implementing the proposed solution must have at least a minimum of 3 years of demonstrable experience implementing web-based solutions.

The skills required should include professional and technical skills, team management, communication, presentation and facilitation skills, etc.

Technically skilled individuals will be expected to perform knowledge transfer and assistance to Ithala IT's technical personnel in driving the technical implementation of RASET Portal. To this end, bidders shall have to outline programs that will ensure a measurable knowledge transfer strategy to Ithala IT's technical staff as part of their response.

III. Reference Sites

The bidder to supply at least three (3) reference sites where the company successfully implemented web based solutions.

IV. Proposed Solution – RASET Portal

V. Proposed Project Delivery Methodology with Project plan

The bidder to include the proposed implementation methodology in terms of the Project Methodology and Solution Delivery Life Cycle (SDLC), Integration and migration strategy.

8. STATEMENT OF REQUIREMENT (SOR)

The attached Statement of Requirement (SOR) will be used to evaluate the proposed software/ application where bidders will be requested to do the demonstration of their solution. The rating tables for bidder's response is structured as follows:

Response	Rating	Explanation
SUP	5	Supported as delivered "out-of-the-box"
MOD	4	Supported via modifications (screen configurations, reports, GUI tailoring, etc.)
3RD	3	Supported via a third party solution
CST	2	Supported via customization (changes to source code)
FUT	0	Will be supported in a future release
NS	0	Not supported

Priority	Essential	10	This indicates that the requirement is a "prerequisite" for the final solution, i.e. without it the solution will not meet the requirements of the organization and its exclusion in any way may result in the solution not being selected.
	Required	6	This indicates that the requirement is "important" to the final solution i.e. without it the solution may not meet the requirements of the organization.
	Nice to Have	3	This indicates that the requirement is a "Nice to Have" and as such would enhance the ultimate solution, but it's exclusion will not impact on the delivery of the required solution.

C.8 PROPOSED FEES

Pricing Schedule Final Summary

NAME OF BIDDER:

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

Service Item	Year 1	Year 2	Year 3	Year 4	Year 5
Development, Customisation and Implementation					
Training and Skills transfer					
Annual Licencing					
Hosting					
Post implementation Support and maintenance (Rate per hour x 600 hours per year) - utilised as and when required, we will also need onsite support – unutilised hours will be carried over to the next year/s.					
Post Contract : Handover					
VAT					
TOTAL					

Tenderers signature.....

C.9 EVALUATION PROCESS & CRITERIA

This phase consists of Mandatory administrative compliance evaluation of all proposals.

		Compliance			
		Yes	No	Noted	If no, indicate deviation
1.	PRE-QUALIFICATION CRITERIA				
1.1	a) Only bidders with a B-BBEE Status of Level 1 Contributor are legible to submit a bid* Bidders are required to submit an originally certified B-BBEE certificate from a SANAS accredited verification agency or a Sworn Affidavit (as attested by the Commissioner of Oaths)				
2	<u>STAGE ONE: ADMINISTRATION COMPLIANCE</u>				
2.1	All bids duly lodged will be examined to determine compliance with bidding requirements and conditions. Bids with material deviations from the requirements/conditions may be eliminated from further adjudication. Mandatory Bids will be considered compliant if the following documents have been submitted or condition met (whichever is applicable): • The bidder must be registered as a vendor on the National Treasury Central Supply Database (CSD), which can be found at https://secure.csd.gov.za/ in compliance with National Treasury compliance paragraph 4.2 with instruction note 4a of 2016/2017 • The bidder must be in good standing with SARS and such information will be verified through Central Supply Database (CSD) or using SARS efilling pin in National Treasury compliance with instruction note 9 of 2017/2018 prior to the award of the bid; • SBD4 - A completed and duly signed declaration of Interest. Should a conflict of interest be declared or identified, the bid would be declared non- responsive. NB Bidder must ensure all pages are complete and all questions answered, you are to indicate not applicable (N/A) where appropriate. • SBD8 - A completed and duly signed declaration of bidders past supply chain management practices. Should the bidder be				

	found to have abused the supply chain management system, the bid would be declared non- responsive The proposing entities are bona fide entities, registered in accordance with the laws of SA				
3	<u>STAGE TWO: FUNCTIONALITY EVALUATION</u>	Yes	No	Noted	If no, indicate deviation
3.1	Phase One: This area of functionality evaluation is based on the methodology and project implementation team. Bidders who achieve the minimum threshold of 60% for phase one of the functionality will be considered further in the evaluation process.				
3.2	Phase Two: This area of functionality evaluation focuses on the demonstration of the system and presentation of its capabilities. This stage will be an interactive session between the Bid Evaluation committee and the prospective Bidders', who will be given an opportunity to provide clarity on their written proposals by demonstrating their systems capabilities. Bidders who achieve the minimum threshold of 70% for phase two of the functionality will be considered further for price and B-BBEE Evaluation.				
4	<u>STAGE THREE: PRICING and B-BBEE</u>				
4.1	Price and B-BBEE evaluation will carried on all bidders to bidders who qualify on phase 2 of Stage 2.				
1.5	<u>ADJUDICATION:</u>				
1.5.1	The Bid Adjudication Committee will consider the recommendations and make the final award.				
1.5.2	The bid shall be awarded at the sole and absolute discretion of Ithala. Ithala hereby represents that it is not obliged to award this bid to any bidder. Ithala is entitled to retract this bid at any time as from the date of issue. Ithala is not obliged to award this bid to the bidder that quotes the lowest.				
1.5.3	A bidder shall be disqualified from bidding if any attempt is made either directly to solicit and/or canvass any information from any employee or				

	agent of Ithala regarding this bid from the date the offer is submitted until the date of award of the bid.				
1.6	Awarding of contract				
1.6.1	Ithala reserves the right to award this bid in full or part				

Phase 1: FUNCTIONALITY – METHODOLOGY AND PROJECT IMPLEMENTATION TEAM EVALUATION

Evaluation Functionality-The Quality Criteria and Maximum Score in Respect of Each of the Criteria Are as Follows:

Applicable Scores = 0 – 5

TECHNICAL CRITERIA	Description	Weight	Score	Total
Project Implementation Plan	Project plan: This item will be measured on specific project deliverables against expected timeframes, bidders are to provide a detailed project plan to this effect, which will incorporate, Analysis, Design, Development and Implementation. Scoring guide • Project Plan with 4 key areas (as listed) and a time frame = 6 but not exceeding 8 Months = 5 • Project Plan with 4 key areas (as listed) and a time frame greater than 8 but not exceeding 10 Months = 4 • Project Plan with 4 key areas (as listed) and a time frame greater than 10 but not exceeding 12 Months = 3 • Project Plan with a time frame greater than 12 Months or less than 6 months = 0	25		
Project References	Reference Sites The bidder is to provide client reference letters where the bidder or its partner to this project have successfully implemented web-based solution, Scoring guide • More than 3 Client reference letters = 5 • 3 Client reference letters = 4 • 2 Client reference letters = 3 • Less than 2 reference letters= 0 Ithala reserves the right to authenticate the validity of the reference letter.	30		

Resourcing Bidders to provide the list of relevant resources that will work with Ithala. Ithala requires the following key role or expertise to be on-site and full time throughout the system implementation: Project Manager; Business Analyst, Software Developer Specialist. Each CV must be strong on the above-mentioned key roles. Points to be allocated if at least one detailed CV per resource is submitted. Provide Curriculum Vitae as per template in annexure A.	Project Manager to have relevant experience and skills in the System implementation Resource 1: Project Manager Scoring Guide ≥ 8 years of Project Management experience = 5 ≥ 5 years of Project Management experience = 4 ≥ 3 years of Project Management experience = 3 < 3 years of Project Management experience = 0	5			
	Business Analyst to have relevant experience and skills in the implementation of web-based systems. Resource 2: Business Analyst Scoring Guide ≥ 5 years of Business Analysis experience = 5 ≥ 3 years of Business Analysis experience = 4 ≥ 2 years of Business Analysis experience = 3 < 2 years of Business Analysis experience = 0	5			
	Developer Specialist to have relevant experience and skills in the implementation of web-based systems. Resource 3: Developer Specialist Scoring Guide ≥5 years of Software Development experience = 5 ≥3 years of Software Development experience = 4 ≥2 years of Software Development experience = 3 < 2 years of Software Development experience = 0	5			

System integration capabilities	Bidders are required to demonstrate in their proposal, solution capability to interface with following systems indicated in section 5.2. The solution should at a minimum interface with all the mandatory systems and failure to do so will result in a score of zero (0) in this criteria • System can interface with the mandatory system and two (2) non-mandatory systems = 5 • System can interface with the mandatory system and one (1) non-mandatory systems = 4 • System can interface with the mandatory system = 3 • System cannot interface with mandatory systems = 0	30			
NB: Only bids meeting or exceeding the Stipulated Minimum Threshold (SMT) of 75% will be considered for Phase 2 Functionality Evaluation.					
Total (Max =500)					
AVERAGE (Total ÷ 5)					

PHASE 2: FUNCTIONALITY CRITERIA (SYSTEM DEMONSTRATION)

Functionality Criteria		Weight	Score	Total
1	System Demonstration This stage will be an interactive session between the Bid Evaluation committee and the prospective Bidders', who will be given an opportunity to provide clarity on their written proposals by demonstrating their systems' capabilities. Bidders are required to demonstrate in their proposal, solution capability to meet requirements indicated in section 5.1. Scoring Guide - Bidders will be scored according to automated scoring sheet (annexure 1) which is as per areas indicated in section 5.1 of the bid document. Scores will be allocated for each system capability and tallied at the end to achieve the applicable percentage. - Bidders need to meet the minimum threshold of 70% of the scoring sheet to be considered for	100		
Only bids meeting or exceeding the Stipulated Minimum Threshold (SMT) of 70% will be considered for further for Price and B-BBBEE evaluation.				

Annexure A

Curriculum Vitae (CV) Template to be Completed

Resource Table			
	Skills Set	Full Name	CV attached
Resource 1	Project Manager		
Resource 2	Business Analyst		
Resource 3	Systems developer		

Resource 1

PERSONAL DETAILS

.....

.....

PROFESSIONAL SUMMARY AND SKILLS

.....

.....

.....

WORK EXPERIENCE

Company Name:

Role (Expertise in Project Management – web-based systems implementation)

Start Period:

End Period:

Activities:

Project Manager Activities

-
-

References

Resource 2

PERSONAL DETAILS

.....

.....

PROFESSIONAL SUMMARY AND SKILLS

.....

.....

.....

WORK EXPERIENCE

Company Name:

Role (Expertise in Business Analysis – web-based systems implementation)

Start Period – End Period:

Activities:

Business Analyst Activities

-
-

References

Resource 3

PERSONAL DETAILS

.....
.....

PROFESSIONAL SUMMARY AND SKILLS

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

WORK EXPERIENCE

Company Name:
Role (Expertise in System Development – Web based system implementation)
Start Period – End Period:
Activities:

Developer Specialist Activities

-
-

References

10. TAX CLEARANCE REQUIREMENTS

IT IS A CONDITION OF BIDDING THAT

- The taxes of the successful bidder must be in order, or that satisfactory arrangements have been made with the Receiver of Revenue to meet his/her tax obligations.
- In bids where Consortia/Joint Ventures/Sub-contractors/Partners are involved, each party must be in compliance with SARS and such information will be verified through central supplier database (CSD).

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

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

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

- 2.1 Full Name of bidder or his or her representative:
- 2.2 Identity Number:
- 2.3 Position occupied in the Company (director, trustee, shareholder²):
.....
- 2.4 Company Registration Number:
.....
- 2.5 Tax Reference Number:
.....
- 2.6 VAT Registration Number:

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

¹"State" means –

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

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

2.7 Are you or any person connected with the bidder presently employed by the state?

YES / NO

2.7.1 If so, furnish the following particulars:

Name of person / director / trustee / shareholder/ member:

Name of state institution at which you or the person connected to the bidder is employed:

Position occupied in the state institution:

Any other particulars:

.....

.....

.....

2.7.2 If you are presently employed by the state, did you obtain the appropriate authority to undertake remunerative work outside employment in the public sector?

YES / NO

2.7.2.1 If yes, did you attached proof of such authority to the bid document?

YES / NO

(Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the bid.

2.7.2.2 If no, furnish reasons for non-submission of such proof:

.....

.....

.....

2.8 Did you or your spouse, or any of the company's directors / trustees / shareholders / members or their spouses conduct business with the state in the previous twelve months?

YES / NO

2.8.1 If so, furnish particulars:

.....

.....

.....

2.9 Do you, or any person connected with the bidder, have any relationship (family, friend, other) with a person employed by the state and who may be involved with the evaluation and or adjudication of this bid?

YES / NO

2.9.1 If so, furnish particulars.

.....

.....

.....

2.10

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

YES/NO

2.10.1

If so, furnish particulars.

.....

.....

.....

2.11

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

YES/NO

2.11.1

If so, furnish particulars:

.....

.....

.....

Full details of directors / trustees / members / shareholders.

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

DECLARATION

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

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

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF

PARAGRAPH 23 OF THE GENERAL CONDITIONS OF CONTRACT SHOULD THIS DECLARATION

PROVE TO BE FALSE.

.....

Signature

.....

Date

.....

**C.12 DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES
(TO BE COMPLETED BY BIDDER.)**

- 1 This Section must form part of all bids invited.
- 2 It serves as a declaration to be used by Ithala Development Finance and Corporation Limited 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 disregarded if that bidder, or any of its directors have-
 - a. abused Ithala Development Finance and Corporation Limited 's supply chain management system;
 - b. committed fraud or any other improper conduct in relation to such system; or
 - c. failed to perform on any previous contract.
- 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/Ithala Development Finance and Corporation Limited's database as companies or persons prohibited from doing business with the public sector?	Yes ☐	No ☐
4.1.1	If so, furnish particulars:.....		
4.2	Is the bidder or any of its directors listed on the Register for Bid Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)?	Yes ☐	No ☐
4.2.1	If so, furnish particulars:.....		
4.3	Was the bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five years?	Yes ☐	No ☐
4.3.1	If so, furnish particulars:.....		
4.4	Was any contract between the bidder and any organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	Yes ☐	No ☐

C.13 CERTIFICATE OF INDEPENDENT BID DETERMINATION

- 1 This Standard Bidding Document (SBD) 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 Treasury Regulation 16A9 prescribes that accounting officers and accounting authorities must take all reasonable steps to prevent abuse of the supply chain management system and authorizes accounting officers and accounting authorities to:
 - a. Disregard the bid of any bidder if that bidder, or any of its directors have abused the institution’s supply chain management system and or committed fraud or any other improper conduct in relation to such system.
 - b. cancel a contract awarded to a supplier of goods and services if the supplier committed any corrupt or fraudulent act during the bidding process or the execution of that contract
- 4 This SBD 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 (SBD 9) must be completed and submitted with the bid:

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 Institution)

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

I certify, on behalf

of: _____ that:

(Name of Bidder)

- 1. I have read and I understand the contents of this Certificate;

¹ Includes 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

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
 - I 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)
 - I methods, factors or formulas used to calculate prices;
 - (d) the intention or decision to submit or not to submit, a bid;
 - I 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. I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

11.

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.

C.14 PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2017

BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF B-BBEE, AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017.

1. GENERAL CONDITIONS

- 1.1 The following preference point systems are applicable to all bids:
- 80/20 system for requirements with a Rand value equal to or above R30 000 and up to R50million (all applicable taxes included); and
 - 90/10 system for requirements with a Rand value above R50m (all applicable taxes included).
- 1.2 The value of this bid is estimated to below R50 000 000 (all applicable taxes included) and therefore the 80/20 system shall be applicable.
- 1.3 Preference points for this bid shall be awarded for:
- (a) Price; and
 - (b) B-BBEE Status Level of Contribution.
- 1.3.1 The maximum points for this bid are allocated as follows:

	POINTS
1.3.1.1 PRICE	
1.3.1.2 B-BBEE STATUS LEVEL OF CONTRIBUTION	
Total points for Price and B-BBEE must not exceed	100

- 1.4 Failure on the part of a bidder to fill in and/or to sign this form and submit a B-BBEE Verification Certificate from a Verification Agency accredited by the South African Accreditation System (SANAS) or a Registered Auditor approved by the Independent Regulatory Board of Auditors (IRBA) or an Accounting Officer as contemplated in the Close Corporation Act (CCA) together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.
- 1.5 The purchaser reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the purchaser

2. DEFINITIONS

- 2.1 “all applicable taxes” includes value-added tax, pay as you earn, income tax, unemployment insurance

fund contributions and skills development levies;

- 2.2 **“B-BBEE”** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- 2.3 **“B-BBEE status level of contributor”** means the B-BBEE status received by a measured entity based on its overall performance using the relevant scorecard contained 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;
- 2.4 **“bid”** means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of services, works or goods, through price quotations, advertised competitive bidding processes or proposals;
- 2.5 **“Broad-Based Black Economic Empowerment Act”** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- 2.6 **“comparative price”** means the price after the factors of a non-firm price and all unconditional discounts that can be utilized have been taken into consideration;
- 2.7 **“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;
- 2.8 **“contract”** means the agreement that results from the acceptance of a bid by an organ of state;
- 2.9 **“EME”** means any enterprise with an annual total revenue of R5 million or less,
- 2.10 **“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;
- 2.11 **“functionality”** means the measurement according to predetermined norms, as set out in the bid documents, of a service or commodity that is designed to be practical and useful, working or operating, taking into account, among other factors, the quality, reliability, viability and durability of a service and the technical capacity and ability of a bidder;
- 2.12 **“non-firm prices”** means all prices other than “firm” prices;
- 2.13 **“person”** includes a juristic person;
- 2.14 **“rand value”** means the total estimated value of a contract in South African currency, calculated at the time of bid invitations, and includes all applicable taxes and excise duties;
- 2.15 **“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;
- 2.16 **“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 9 February

2007;

- 2.17 **“trust”** means the arrangement through which the property of one person is made over or Bequeathed to a trustee to administer such property for the benefit of another person; and
- 2.18 **“trustee”** means any person, including the founder of a trust, to whom property is bequeathed in order for such property to be administered for the benefit of another person.

3. ADJUDICATION USING A POINT SYSTEM

- 3.1 The bidder obtaining the highest number of total points will be awarded the contract.
- 3.2 Preference points shall be calculated after prices have been brought to a comparative basis taking into account all factors of non-firm prices and all unconditional discounts;.
- 3.3 Points scored must be rounded off to the nearest 2 decimal places.
- 3.4 In the event that two or more bids have scored equal total points, the successful bid must be the one scoring the highest number of preference points for B-BBEE.
- 3.5 However, when functionality is part of the evaluation process and two or more bids have scored equal points including equal preference points for B-BBEE, the successful bid must be the one scoring the highest score for functionality.
- 3.6 Should two or more bids be equal in all respects, the award shall be decided by the drawing of lots.

4. POINTS AWARDED FOR PRICE

4.1 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

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

Where

P_s = Points scored for comparative price of bid under consideration

P_t = Comparative price of bid under consideration

$P_{\min}$ = Comparative price of lowest acceptable bid

5. Points awarded for B-BBEE Status Level of Contribution

- 5.1 In terms of Regulation 6 (2) and 7 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

B-BBEE Status Level of Contributor	Number of points (90/10 system)	Number of points (80/20 system)
1	10	20
2	9	18
3	6	14
4	5	12
5	4	8
6	3	6
7	2	4
8	1	2
Non-compliant contributor	0	0

- 5.2 Bidders who qualify as EMEs in terms of the B-BBEE Act must submit a certificate issued by an Accounting Officer as contemplated in the CCA or a Verification Agency accredited by SANAS or a Registered Auditor. Registered auditors do not need to meet the prerequisite for IRBA's approval for the purpose of conducting verification and issuing EMEs with B-BBEE Status Level Certificates.
- 5.3 Bidders other than EMEs must submit their original and valid B-BBEE status level verification certificate or a certified copy thereof, substantiating their B-BBEE rating issued by a Registered Auditor approved by IRBA or a Verification Agency accredited by SANAS.
- 5.4 A trust, consortium or joint venture, will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their B-BBEE status level certificate.
- 5.5 A trust, consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.
- 5.6 Tertiary institutions and public entities will be required to submit their B-BBEE status level certificates in terms of the specialized scorecard contained in the B-BBEE Codes of Good Practice.
- 5.7 A person will not be awarded points for B-BBEE status level if it is indicated in the bid documents

that
such a bidder intends sub-contracting more than 25% of the value of the contract to any other enterprise
that does not qualify for at least the points that such a bidder qualifies for, unless the intended sub-contractor is an EME that has the capability and ability to execute the sub-contract.

- 5.8 A person awarded a contract may not sub-contract more than 25% of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level than the person concerned, unless the contract is sub-contracted to an EME that has the capability and ability to execute the sub-contract.

6. BID DECLARATION

- 6.1 Bidders who claim points in respect of B-BBEE Status Level of Contribution must complete the following:

7. B-BBEE STATUS LEVEL OF CONTRIBUTION CLAIMED IN TERMS OF PARAGRAPHS 1.3.1.2 AND 5.1

- 7.1 B-BBEE Status Level of Contribution: =(maximum of 10 or 20 points)

(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 5.1 and must be substantiated by means of a B-BBEE certificate issued by a Verification Agency accredited by SANAS or a Registered Auditor approved by IRBA or an Accounting Officer as contemplated in the CCA).

8 SUB-CONTRACTING

- 8.1 Will any portion of the contract be sub-contracted? YES / NO (delete which is not applicable)

- 8.1.1 If yes, indicate:

- (i) what percentage of the contract will be subcontracted?%
- (ii) the name of the sub-contractor?
- (iii) the B-BBEE status level of the sub-contractor?
- (iv) whether the sub-contractor is an EME? YES / NO (delete which is not applicable)

9 DECLARATION WITH REGARD TO COMPANY/FIRM

- 9.1 Name of company/firm :

- 9.2 VAT registration number :

- 9.3 Company registration number
:

- 9.4 TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One person business/sole propriety
- ☐ Close corporation
- ☐ Company

☐ (Pty) Limited
[TICK APPLICABLE BOX]

9.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

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

9.6 COMPANY CLASSIFICATION

- ☐ Manufacturer
☐ Supplier
☐ Professional service provider
☐ Other service providers, e.g. transporter, etc.
[TICK APPLICABLE BOX]

9.7 Total number of years the company/firm has been in business?

9.8 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBE status level of contribution indicated in paragraph 7 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I / we 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 paragraph 7, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;
- (iv) If the B-BBEE status level of contribution has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –
 - (a) disqualify the person from the bidding 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) restrict the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, 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

WITNESSES:

1.

.....
SIGNATURE(S) OF BIDDER(S)

2.

DATE:.....

C.15 DEVIATIONS FROM THE REQUEST FOR PROPOSAL

Should the bidder desire to make any departures from, or modifications to this Request for Proposal or to qualify its bid in any way, it shall clearly set out its proposals hereunder or alternatively state them in a covering letter attached to its bid and referred to hereunder, failing which the bidder shall be deemed to be unqualified and conform exactly with the requirements of this Request for Proposal.

If no departures or modifications are desired, the Schedule hereunder is to be marked “NIL” and signed by the bidder.

Unless otherwise specified specifically and stipulated in writing, the Contract constitutes the sole memorial of the Contract between the parties and any terms and conditions forming part of the bidder’s Bid or other documentation shall not form part of the Contract and shall be of no force or effect.

PAGE NUMBER	CLAUSE NUMBER	DEVIATION

SIGNATURE OF BIDDER

DATE

C.16 BID SUMMARY AND DETAILS

We the undersigned submit this bid in accordance with the conditions contained in the referenced RFP document and attach the documents required:

No.	Description in detail	Documents Attached
A. Commercial Documents		(Yes/ No/ N.A.)
1.	Deviations from Request for Proposal	
2.	Cover letter	
3.	Entire Bid Document	
4.	CC or Company Registration Documents or copy of ID if sole propriety	
5.	Registered as a vendor on CSD	
6.	In good standing with SARS and such information will be verified through Central Supply Database (CSD);	
7.	BBBEE Certificate/Affidavit	
8.	Declaration of Interest and Declaration of past SCM Practices	
9.	Joint Venture Agreement where applicable	
B. Technical Documents		
10.	Project Plan	
11.	Reference Letters	
12.	CV – Project Manager	
13.	CV – Business Analyst	
14.	CV – Software Developer	
15.	Functionality (SOR)	
16.	Automated scoring sheet (annex 1)	

Name

Date

Signature