



MUNICIPAL INFRASTRUCTURE SUPPORT AGENT (MISA)

BID NO.: MISA/WSA/016/2026/2027

**APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT HUMAN TECHNICAL
CAPACITY ASSESSMENT IN 36 WATER SERVICES AUTHORITY (WSA)
MUNICIPALITIES IN MPUMALANGA, GAUTENG AND FREE STATE PROVINCES**

SEPTEMBER 2026

Beneficiary	Municipal Infrastructure Support Agent
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Postal Address	1303 Heuwel Road, Riverside Office Park, Letaba House, Centurion 0046
Project Name	Appointment of a service provider to Conduct Human Technical Capacity Assessment in 36 WSA municipalities in Mpumalanga, Gauteng and Free State Provinces
Bid No.	MISA/WSA/016/2026/2027
Compulsory Hybrid Briefing Session Date, Time	Compulsory hybrid Briefing session– at MISA offices: 09 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/343269297521215?p=WoSWyvtx22t6Udzgh0 Meeting ID: 343 269 297 521 215 Passcode: mh7p2hm6
Closing Date and Time	25 September 2026 @ 11h00
Bid/Tender Amount	R.....

1. INVITATION

- 1.1 The Municipal Infrastructure Support Agent (**MISA**) intends to appoint a Service Provider to conduct Human Technical Capacity Assessment in **36 Water Services Authority (WSA) municipalities in Mpumalanga, Gauteng and Free State Provinces**

2. DURATION

- 2.1 The Service Provider is required to provide this service over a period of thirty-six (36) 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 MISA's objectives are:

- To support municipalities to effectively undertake Comprehensive Infrastructure Planning.
- To support municipalities to procure and develop their infrastructure effectively and efficiently.
- To support the management of (infrastructure) operations and ensure a proper maintenance programme for municipal infrastructure.
- To provide specialized technical and management support to municipalities to ensure accelerated delivery of municipal infrastructure and service provision.
- To develop and coordinate the strengthening of technical capacity in municipalities and within the sector as well as facilitate increased access to funding; and
- To monitor the efficiency, effectiveness and impact of infrastructure projects and support initiatives.

- 3.3 MISA is in the process of assisting and supporting the municipalities to be trained as part of the capacity development, especially very important technical skills that lead to the core of service delivery of infrastructure. The assessment is to be undertaken to quantify the artisans, water process controllers and including engineers and technicians that are required to be registered with relevant statutory, professional and occupational bodies, including ECSA where applicable.

4. OBJECTIVES

4.1. Assess Current Human Technical Resource Capacity

- To **evaluate the existing staffing levels, qualifications, skills, and experience** of the municipal Technical Services Directorate.

- Identify any **skills gaps, shortages, or overstaffing** in relation to the current approved organogram and functions.

4.2. **Align Human Capacity with Service Delivery Mandates**

- To **determine if the current human technical capacity is aligned** with the municipality's **Integrated Development Plan (IDP), Service Delivery and Budget Implementation Plan (SDBIP)**, and other strategic documents.
- Ensure the municipality has **adequate and capable personnel** to meet **core service delivery obligations** (e.g., water, sanitation, electricity, roads, housing, etc.).

4.3. **Identify Skills Development Needs**

- To identify specific areas where **capacity-building, training, and upskilling** are required.
- To support the development of a **Skills Development Plan** that is aligned with the **Workplace Skills Plan (WSP)**.

4.4 **Assess the Efficiency of the Technical Services Directorate Structure (Organogram)**

- To determine whether the **current organogram is functionally effective**, and if it supports the municipality's strategic and operational objectives.
- Recommend **realignment or restructuring** where necessary to improve operational efficiency and responsiveness.

4.5 **Support Recruitment and Retention Strategies**

- To identify key **vacant or critical posts** that hinder service delivery.
- Recommend strategies to **attract and retain skilled personnel**, particularly in scarce skills areas (e.g., engineers, town planners, water process controllers, etc).

4.6 **Promote Compliance with Legislative and Policy Frameworks**

- Ensure that the human capacity of the municipality aligns with:
 - The **Municipal Systems Act**
 - **Municipal Finance Management Act (MFMA)**
 - **Employment Equity Act**
 - Other relevant policies such as the **National Capacity Building Framework**.

4.7. **Enable Evidence-Based Decision-Making**

- To provide accurate, up-to-date data that can guide **HR planning, budgeting, and resource allocation**.

- Enable municipalities to make **informed decisions** about capacity development and institutional reform of the Technical Services Directorate.

4.8 Improve Service Delivery Outcomes

- Ultimately, to **enhance the quality, speed, and effectiveness of service delivery** through the allocation, mobilisation and placement of skilled and adequately resourced human capital in the municipalities.

5. SCOPE OF WORK

5.1 DESCRIPTION OF WORKS

5.1.1 Background

Despite well-intentioned frameworks and national oversight, **municipal technical directorates** remain chronically under-capacitated. Skilled technical staff—engineers, planners, technologists—are in short supply across the sector, particularly outside metropolitan councils. As a result, municipalities are overly reliant on external consultants, with minimal skills transfer. This compromises the development, maintenance, and oversight of infrastructure, exacerbating service delivery failures. Planning tools such as IDPs, WSDPs, and maintenance plans are often outdated or poorly implemented, while the approvals and execution of building plans are hindered by delays and maladministration. Even institutional support mechanisms like MISA struggle to meet targets due to both budget constraints and limited municipal readiness. Addressing technical directorate capacity is thus pivotal for restoring institutional effectiveness within local government.

5.1.2 Required services:

The Municipal Infrastructure Support Agent therefore requires the services of a Services Provider to:

- A. Conduct Human Technical Capacity Assessment in 36 WSA municipalities in Mpumalanga, Gauteng and Free State Provinces.
- B. In the first (2026/27) financial year, Human Technical Capacity Assessments (TCAs) will be undertaken in 10 WSAs in Mpumalanga Province. In the second (2027/28) financial year, TCAs will be undertaken in 13 WSAs in Gauteng, Mpumalanga and Free State Province. In the third (2028/29) financial year, the TCAs will be undertaken in 13 WSAs in the Free State Province. The allocation will be as per Table A below:

Table A: 36 WSA Municipalities to be Assessed:

<u>Province</u>	<u>District / Metropolitan Municipality</u>	<u>Local Municipality</u>	<u>No.</u>	Financial Year
Mpumalanga	Ehlanzeni District	Bushbuckridge Local	1	2026/2027
		City of Mbombela Local	2	
		Nkomazi Local	3	
		Thaba Chweu Local	4	
	Gert Sibande District	Dr Pixley Ka Isaka Seme Local	5	
		Mkhondo Local	6	
	Nkangala District	Dr JS Moroka Local	7	
		Emakhazeni Local	8	
		Emalahleni Local	9	
		Steve Tshwete Local	10	
		Thembisile Hani Local	11	
		Victor Khanye Local	12	
Gauteng	Sedibeng District	Emfuleni Local	13	2027/2028
		Lesedi Local	14	
		Midvaal Local	15	
	West Rand District	Merafong City Local	16	
		Mogale City Local	17	
		Rand West City Local	18	
Free State	Fezile Dabi District	Mafube Local	19	2028/2029
		Metsimaholo Local	20	
		Moqhaka Local	21	
		Ngwathe Local	22	
	Lejweleputswa District	Masilonyana Local	23	
		Matjhabeng Local	24	
		Nala Local	25	
		Tokologo Local	26	
		Tswelopele Local	27	
	Thabo Mofutsanyana District	Dihlabeng Local	28	
		Maluti-a-Phofung Local	29	
		Mantsopa Local	30	
		Nketoana Local	31	
		Phumelela Local	32	
		Setsoto Local	33	
	Xhariep District	Kopanong Local	34	
		Letsemeng Local	35	
		Mohokare Local	36	

- C. Based on the results of the human technical capacity assessments, provide proposed intervention action plans coupled with capacity implementation budget estimates and prioritization plans.

- D. It is incumbent upon the Service Provider(s) to utilize any existing information in the execution of this programme. Information may be available from the service authorities themselves (i.e. the municipalities), National and Provincial CoGTAs, Department of Water and Sanitation, Water Boards, SALGA etc.
- E. Service providers are expected to conduct themselves with diligence and integrity in this regard. Required services continued:
 - E1. Assess the Powers and Functions of the WSA and WSP**
 - E2. Assess the organisational structure of the Technical Services Directorate, including units and personnel responsible for WTW and WWTW operations, water and sanitation, and operations and maintenance**
 - E3. Assess Job Description, Professional Registration and Skills Audits Reports**
 - E4. Development of Skills and Capacity Building Plan**
 - E5. Recommendations of Capacity Building Initiatives and Training courses in addressing skills and capacity gaps**

5.1.3 Stakeholder Engagement

It is important that the municipalities and relevant stakeholders are afforded an opportunity to provide input into and validate the findings and recommendations and agree with the findings and recommendations that are coming out of the above assessments and finally incorporated in the Human Capacity Assessment Report Plan. To ensure that, the Services provider must organize and conduct the following sessions with identified stakeholders:

- 1. Inception Session: to inform the stakeholders about the project, identify relevant stakeholders and obtain an overall view on the technical capacity services within the municipality**
- 2. Draft Human Technical Capacity Assessment Plan presentation Session: Presentation of the Assessment plan and findings to stakeholders for their comments.**
- 3. Final Human Technical Capacity Assessment Plan Presentation & adoption session: Presentation of the Final Human Technical Assessment Plan accommodating the recommendations with implementation for acceptance and adoption by the stakeholders and the municipalities as the end user.**

The sessions are compulsory to be attended by the necessary key stakeholders and therefore, it is important that the bidder includes the costs of conducting the sessions in the bid prices and details the cost in detailed total costs and (online sessions are permitted).

5.1.4 Formation of a Project Steering Committee and Conducting Monthly Progress Meetings

The professional services provider in consultation with MISA and the Municipality will facilitate the formation of a project steering committee (PSC) in the inception session.

Thereafter, the professional services provider (PSP) must organise and conduct the monthly PSC meetings and function as the Secretariat of the PSC. The PSP must provide project progress reports to the PSC in the meetings.

5.1.5 Deliverables

The following are the minimum deliverables the professional services provider must deliver within the agreed time frame (Ref: project implementation plan):

Deliverable 1: Inception report

Immediately after signing the agreement, the PSP within two weeks must conduct the inception session and prepare and submit a Project Inception Report together with the session report. The inception report should cover

- Report on project, site and functional requirement
- Agreed services and scope of work
- Consultants Team with Organogram and responsibilities
- Schedule of required surveys, analyses, site and other investigations as necessary
- Approved (by MISA) Project Implementation Schedule (Ref: GCC)

Deliverable 2: Powers and Functions between WSA & WSP Human Technical Capacity Assessment Report

The powers and functions between WSA and WSP human technical capacity assessment report must cover the capacity skills and personnel in provision of water in the communities by municipalities and identify gaps that exist including any interference and finally provide the recommendations.

Deliverable 3: Assess Organogram of Technical Directorates with Units including human resources responsible for operation of WWTW and WTW, etc

The PSP will provide the assessment report with details on the organogram of technical Directorate Units of the municipalities including the filled and vacant positions, organogram must indicate and separate between the approved structure, current operational structure and thereafter finally recommend a suitable structure that can be able to allow the municipality to do its work in providing reliable services to the community. This will also include the length of time of personnel in their respective positions.

Deliverable 4: Assess Job Description, Professional Registration and Skills Audits

The PSP must assess and develop the report in relation to job description and skills audits in the Technical Directorates of each municipality, further identify the skills gaps and come up with recommendations on how the skills gaps can be improved. The PSP should also indicate the senior management vacancy rate per municipality.

Deliverable 5: Development of Skills and Capacity Plan

The PSP to provide the detailed report with skills and capacity plan developed to address the challenges faced by each assessed WSA municipality.

Deliverable 6: Close-out report with Recommendations of Training, Workshops and courses in addressing skills and capacity gaps

The PSP must submit a close-out final report using the MISA close-out report template within 7 days of submission of the Comprehensive Final Human Technical Capacity Assessment Plan.

5.1.6 Project Duration

MISA has envisaged completion of the project would require maximum thirty-six (36) months. Bidders are expected to complete their Technical Capacity Assessments within 9 (nine) months or less within each of the three financial years. The project implementation plan must include at least the following in a Gantt chart form:

- a. Tasks/ activities against each deliverable.**
- b. Milestones to be achieved**
- c. Responsibility (proposed human resources/ personnel)**
- d. Duration with start and end dates**
- e. Bar chart showing duration and links among the tasks**

5.1.7 Beneficiaries

Capacity building is an intervention that strengthens an organization's ability to fulfil its mission by promoting sound management, strong governance, and persistent rededication to achieving results. Furthermore, having the ability to fulfil a capacity building mission means that the organization has:

- a) Enough staff who possess the necessary knowledge and skills,
- b) Appropriate and adequate technical and management systems,
- c) Suitable physical infrastructure, and
- d) Sufficient financial and other resources.

Thus, capacity building is not limited to training personnel or the provision of technical assistance, but may include overhauling systems, remodelling physical infrastructure, recruiting new personnel, and improving the efficiency of the use of existing resources.

6. PROJECT OUTPUT AND OUTCOMES

- Evidence-based recommendations within the capacity development policies.
- Improved resource allocation for training and recruitment.
- Enhanced alignment between technical capacity and service delivery mandates.
- Strengthening the professionalisation and performance in the local government sphere.

7. PROJECT MANAGEMENT

The MISA Project Manager is the Assistant Director: Infrastructure Assessment and Analysis.

8. TECHNICAL PROPOSAL

Bidders must be able to provide a detailed project plan and technical proposal and be able to demonstrate programmes they have developed in relation to all aspects as mentioned above.

- 8.1 A company profile that highlights experience in providing technical capacity assessment and support provided in the development of engineering profession or supports in the technical services of all three spheres of Government or private sector similar institutions.
- 8.2 At least one or two client reference letters of similar projects undertaken by the company in a medium to large complex organisation as highlighted in the other competencies on item 6 in table C below, preferably public sector or Local Government or similar private sector that deals with infrastructure and built environment in service delivery. 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 Curriculum vitae of three (3) additional resources with relevant experience in Technical Capacity Assessment or support in the technical engineering services in the local & public spheres of government, as well as copies of a tertiary qualification in the following fields Civil Engineering, Human Resource Management, Performance Monitoring and Evaluation or related equivalent tertiary qualifications.
- 8.4 The project manager must be registered with the ECSA or SACPCMP.
- 8.5 Management team members (Executive Manager/ Key Accounts Manager and Finance Manager) with a minimum three-year tertiary qualification in their respective fields and minimum 3 years' experience of managing projects, accounting services and finance respectively and must demonstrate adequate experience through the number, types and geographical spread of projects/assignments undertaken. Detailed CVs that clearly indicate experience and qualifications of all team members must be included in the proposal.

9. FINANCIAL PROPOSAL

- 9.1 Complete the pricing schedule in SBD 3.3
- 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

Bids will be evaluated in three stages: (1) mandatory requirements, (2) functionality, and (3) price and specific goals

NB: Bidders (as well as each member of JV or consortium or partnership agreement) must submit proof of registration with the National Treasury's centralised supplier database Bidders must ensure that they are registered on the CSD before bid closing date and before they submit bid proposals.

10.1 STAGE 1 – MANDATORY DOCUMENTS

Table B: Mandatory documents

No.	Item/description	Yes/No
10.1.1	Fully completed and signed Pricing Schedule or SBD 3.3	
10.1.2	In case of a Joint Venture, a written agreement between the parties which must clearly set out the roles and responsibilities of each member and include a resolution of each company of the Joint Venture together with a resolution by its directors authorising a member of the Joint Venture to sign the documents on behalf of the Joint Venture.	
10.1.3	Project Manager: proof of registration with Engineering Council of South Africa (ECSA) in the civil engineering discipline or South African Council for the Project and Construction Management Professions (SACPCMP) within the built environment, i.e. civil, electrical or mechanical engineering, quantity surveying, town/urban planning, building studies. Project manager must specify this requirement is for which discipline they are qualified.	
10.1.4	Attendance of compulsory briefing session	

10.2 STAGE 2 - FUNCTIONALITY

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

10.2.1 METHODOLOGY/ APPROACH (20 points)

The approach paper must respond to the scope of work (reference: 5 Scope of work). Methodology must be comprehensive and must indicate sufficient knowledge of the subject matter. It must cover:

- WSA/WSP powers and functions;
- Technical organisational structures;
- Vacancy and staffing assessments;
- Job descriptions;
- Professional registration;
- Skills audits;
- Stakeholder validation;

- Capacity-building plans; and
 - Implementation/prioritisation plans.
- Must demonstrate sufficient understanding of the scope of work and desired outcomes: not more than 10 pages.

The approach paper must contain at least the following:

Table of Contents: Listing of contents of the approach paper with page numbers and/ references to annexures (if any);

Executive Summary: A brief summary of the whole contents of the approach paper;

10.2.1.1. Approach: Detailed approach that the bidder feels best to deliver the intended services for the Project with identification of tasks, for each of the activities/ deliverables as have been foreseen in '5. Scope of work', detailing at least the following:

10.2.1.2. Technical approach and methodology should explain the PSP's understanding of the project objectives. It should highlight the issues of importance and explain the technical approach they will adopt to address them. The proposal should explain the methodologies, which are to be adopted, demonstrate the compatibility of these methodologies with the proposed approach and address any modifications required to complete the proposed scope of work.

10.2.1.3. Management method should be developed and approved during the project-planning phase (inception phase) to confirm major deliverables/milestones and acceptance criteria. It should also be used to manage approved project processes and responsibilities.

10.2.1.4. Stakeholder identification, management and reporting mechanism to be followed.

10.2.1.5. Assessment Criteria Description:

10.3. Methodology to be adopted

10.3.1 Programme Knowledge (3 marks)

This criterion assesses your understanding of the programme or project you are engaging with. You will be evaluated on:

- How well you demonstrate knowledge of the programme's **objectives, components, and intended outcomes**.
- Your ability to show a grasp of the **target audience, relevant policies, or frameworks** that govern the programme.
- Whether you can accurately and confidently explain **how the programme functions** or how it fits into a broader strategy.

10.3.2 Informativeness and Appropriateness of Proposed Approach (3 marks)

This evaluates how well your proposed method or strategy fits the purpose and context. You will be assessed on:

- Whether your approach is **realistic**, **relevant**, and **aligned** with the programme's goals.
- If your proposal shows **innovation** while remaining **practical** and **informed** by existing challenges or best practices.
- The extent to which your method is based on **research**, **evidence**, or **logical reasoning**.

10.3.3 Presentation and Organogram (2 marks)

This refers to how well your proposal is structured and visually communicated. You will be assessed on:

- **Clarity and professionalism** of your written or visual presentation.
- How well your **ideas are organized** (logical flow, headings, clear language, etc.).
- The **accuracy and relevance of your organogram**, which is a visual representation (usually hierarchical) of the structure, roles, and reporting lines in your proposed setup.

10.4. Project implementation schedule/Programme (Listed Activity in the section 5: Scope of Work).

10.4.1 Appropriateness of Identified Tasks and how realistic the timelines are (2 marks)

This assesses whether the tasks you've identified are the **right ones** for achieving the project's goals.

You will be evaluated on:

- Whether the tasks are **relevant** to the project scope.
- If each task contributes meaningfully to the **overall objectives**.
- How well the tasks are **logically sequenced** and detailed enough to be actionable.
- How realistic the timelines are.
- How well you've identified **task dependencies** (i.e., which tasks must happen before others).

10.4.2 Deliverables (1 mark)

This criterion checks whether the **outputs** of the project are clearly defined and appropriate.

You will be evaluated on:

- Whether each task or phase has a **clear, measurable output** (a deliverable).
- If the deliverables are **realistic, relevant, and aligned with project goals**.
- Whether you've clearly distinguished between **activities** (what you do) and **deliverables** (what you produce).

10.4.3 Defining Milestones (1 mark)

This focuses on how well you've identified key **checkpoints** in the project.

You will be assessed on:

- Whether the milestones **reflect significant progress points** (e.g., phase completions, approvals, testing).
- If the milestones are **realistically timed** and used to **track progress**.
- Whether they help in **managing risks** and keeping the project on schedule.

10.4.4 Timeliness and Task Interdependencies (1 mark)

This focuses on ensuring delivery of the project on time.

10.5. Project implementation Risks, Stakeholder identification and management

10.5.1 Adequacy of Understanding of Programme Risks (1)

This criterion evaluates the depth and clarity of the bidder's understanding of project/programme risks associated with the programme. It considers whether the individual or team has:

- Identified key risks (strategic, operational, financial, legal, technical, etc.)
- Assessed the likelihood and impact of each risk
- Demonstrated awareness of how these risks may evolve over time
- Proposed appropriate mitigation strategies
- Shown integration of risk considerations into programme planning and decision-making

10.5.2 Appropriateness of Stakeholder Identification (2)

This criterion measures how well stakeholders relevant to the programme have been identified, categorized, and analysed. It considers:

- Inclusion of all key internal and external stakeholders (e.g., users, sponsors, regulatory bodies, partners)
- Accuracy in stakeholder roles, interests, influence, and potential impact

- Use of stakeholder analysis tools (e.g., stakeholder maps, power-interest grids)
- Evidence that stakeholder needs and expectations are considered in planning and communication strategies

10.6. Skills Transfer

10.6.1 Skills Transfer to MISA Young Graduates/Municipal Officials

(Training on the Development of Technical Capacity Assessment)

Assessment Criteria Description:

This criterion assesses the effectiveness and quality of skills transfer provided to MISA Young Graduates and/or municipal officials, specifically in relation to understanding and applying the principles, methodologies, and tools involved in the **development of a Technical Capacity Assessment**. To this end the bidder must develop a skills transfer schedule clearly stating

- Skills to be transferred – 1;
- Learning outcomes/milestones – 1;
- Training methods – 1;
- Implementation schedule/timeframes – 1.

Key areas of evaluation include:

- **Relevance and clarity of training content** in relation to technical capacity assessment frameworks and municipal infrastructure planning.
- **Participant engagement and comprehension**, including how well the concepts were communicated and internalized.
- **Practical application of knowledge**, such as the ability of trainees to conduct or contribute to a basic technical capacity assessment.
- **Use of appropriate training methods and materials**, tailored to the knowledge level and roles of the trainees.
- **Evidence of mentorship, coaching, or follow-up support**, contributing to long-term skills retention and confidence.
- **Alignment with MISA's mandate** to build sustainable municipal technical capacity.

Table C: Functionality criteria (stage 2)

No.	Evaluating Point	Assessment Criteria	Maximum allocated point(s)
1.	Methodology to be adopted	Programme knowledge (3), informativeness and appropriateness of the proposed approach (3) and presentation and organogram (2)	8 points
	Project implementation schedule/Programme (Listed Activity in the section 5: Scope of Work)	Appropriateness of identified tasks (2), deliverables (1), defining milestones (1) and timeliness (1) with interdependencies to ensure delivery of the project on time	5 points
	Project implementation Risks, Stakeholder identification and management	Adequacy of understanding of programme risks (1) and appropriateness of stakeholder identification (2)	3 points
	Skills Transfer	Skills Transfer Schedule for the transfer of skills to MISA Young Graduate/Municipal Officials (Training of MISA Young Graduates/Municipal Officials to understand development of Technical Capacity Assessment)	4 points
		TOTAL	20 POINTS

	OTHER REQUIRED COMPETENCIES	POINTS
2.	Team Leader/ Project Manager	
	Qualification Certified copies of Project Management qualification from a recognised tertiary institution. a) Masters = 5 points b) Honours = 4 points	5

	c) Degree = 3 points d) Diploma = 2 points	
	Experience Experience in Project Management Proven technical expertise in the Project Management and demonstrate knowledge/track record of Project Management including; • Strong project management skills with a proven track record of undertaking large-scale projects. • Demonstrate comprehensive knowledge in project planning, project execution, project monitoring and controlling. • Demonstrate comprehensive knowledge and understanding of government legislation, technical expertise and practical experience in planning and budget issues related to infrastructure development. • ≥ 9 years = 10 points; • ≥ 6 but < 9 years = 7 points; • ≥ 4 but < 6 years = 5 points; • ≥ 2 but < 4 years = 3 points; • ≥ 1 but < 2 years = 1 point	10
3.	Resource 1 (Professional)	
	Qualifications Certified copies of qualification in engineering services (Civil Engineering) a) Masters = 5 points b) Honours = 4 points c) Degree = 3 points d) Diploma = 2 point	5
	Experience Proven years of experience in the municipal technical sector (e.g., civil engineering, urban infrastructure, water/sanitation, roads), Assess technical skills and capacity of municipal staff, evaluate tools, equipment, software used by technical staff, provide recommendations aligned with infrastructure and service delivery goals: • ≥ 9 years = 10 points; • ≥ 6 but < 9 years = 7 points; • ≥ 4 but < 6 years = 5 points; • ≥ 2 but < 4 years = 3 points; • ≥ 1 but < 2 years = 1 point	10

4.	Resource 2 (Professional)	
	Qualifications Human Resources / Workforce Planning Expert Certified copies of qualification in human resources, industrial psychology, business administration or related fields. a) Masters = 5 points b) Honours = 4 points c) Degree = 3 points d) Diploma = 2 point	5
	Experience HR analysis, workforce assessments, or strategic HR planning, Evaluate staffing levels, job descriptions, performance systems and Conduct skills gap analysis and training needs assessments. • ≥9 years = 10 points; • ≥6 but <9 years = 7 points; • ≥4 but <6 years = 5 points; • ≥2 but <4 years = 3 points; • ≥1 but <2 years = 1 point	10
5.	Resource 3 (Professional)	
	Qualifications Monitoring and Evaluation (M&E) Specialist Certified copies of qualification in M&E, development studies, statistics, or a relevant discipline. a) Masters = 5 points b) Honours = 4 points c) Degree = 3 points d) Diploma = 2 point	5
	Experience Proven experience in designing and conducting assessments, preferably in public service contexts • ≥9 years = 10 points; • ≥6 but <9 years = 7 points; • ≥4 but <6 years = 5 points; • ≥2 but <4 years = 3 points; • ≥1 but <2 years = 1 point	10
6.	Company Experience (20 points): A minimum of six months' experience is required in providing human technical capacity assessments, municipal organisational assessments, skills audits, workforce planning, technical services assessments and capacity-development planning. This experience must only relate to instances where	20

the tenderer acted as the main/principal consultant with minimum three (3) relevant projects handled and supported by reference letters from contactable and verifiable references on the company's official stamped letterhead showing the period of the contract.	
Experience: Less than 6 months = 0 6 months – 1 year = 5 Above 1 year = 10 Projects: Less than 1 projects = 0 Between 1 and 3 projects = 5 More than 3 projects = 10	
TOTAL =	100

Service providers need to score a minimum of **70 points** on functionality to proceed to price and specific-goals stage

10.3 STAGE 3 - PRICE AND SPECIFIC GOALS

Table D: Specific goals (stage 3)

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)	Evidence
Women-owned enterprise: 51% or more ownership by women	8	Certified ID copies of Directors + CIPC Company Registration Documents
Enterprise owned by Persons with Who are youth (51% or more)	6	Certified ID copies of Directors + CIPC Company Registration Documents
B-BBBEE status level contributors from level 1 to 2 which are QSE or EME	6	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
Total scored points	20	

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 assessment progress, municipal engagements, data received/outstanding, risks, findings, deliverables, recommendations and corrective actions.

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 is done by means of electronic transfer directly into the bidder's bank account.

14. SUBMISSION OF PROPOSALS

- 14.1 The Tender Documents **should** also include a soft copy (Memory Stick - all in PDF Format) of the proposal, and to reach MISA offices before **11:00 on 25th of September 2026** and must be enclosed in a sealed envelope clearly inscribed on the outside:

BID NUMBER: MISA/WSA/016/2026/2027

CLOSING DATE AND TIME: 25 SEPTEMBER 2026

- 14.2. 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.
- 14.3. No late submissions will be considered under any circumstances.

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. 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.

17. QUESTIONS AND REQUESTS FOR CLARIFICATIONS

Bidders must carefully examine the bid documents and, if in doubt about any provision, request clarification. 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. For queries, please contact the following person:

Ms.M. Batyi

E-mail: mandy.batyi@misa.gov.za

INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE <i>(Municipal Infrastructure Support Agent (MISA))</i>					
BID NUMBER:	MISA/WSA/016/2026/2027	CLOSING DATE:	25 SEPTEMBER 2026	CLOSING TIME:	11:00
DESCRIPTION	APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT HUMAN TECHNICAL CAPACITY ASSESSMENT IN 36 WATER SERVICES AUTHORITY (WSA) MUNICIPALITIES IN MPUMALANGA, GAUTENG AND FREE STATE PROVINCES				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
1303 Heuwel Road					
Riverside Office Park, Letaba House					
Centurion,					
Pretoria					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Ms. Mandy Batyi	CONTACT PERSON	Mr Thabo Mashavha		
TELEPHONE NUMBER	012 848 5300	TELEPHONE NUMBER	012 848 5300		
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

NAME OF BIDDER:

BID NO.: MISA/WSA/016/2026/2027

CLOSING TIME: 11:00

CLOSING DATE: 25 SEPTEMBER 2026

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

CONTRACT PRICE ADJUSTMENT (CPA) PROVISIONS & THE 90/10 RULE APPLICATION

1. **Firm Pricing Period (First 12 Months):** In compliance with South African National Treasury Supply Chain Management instructions, all professional fees and resource rates quoted in this pricing schedule shall remain **firm and fixed for the first twelve (12) months** from the date of contract commencement. No escalation claims will be entertained during this initial period.
2. **The 90/10 Split Rule for Services:** To mitigate financial risk to the State while protecting the provider against operational inflation, all consulting and assessment rates are structured using a **90% adjustable and 10% non-adjustable split**:
 - 2.1 **10% Non-Adjustable Portion:** A minimum of 10% of the total tendered professional fee shall remain strictly firm and fixed for the entire 36-month contract duration to cover fixed corporate overheads.
 - 2.2 **90% Adjustable Portion:** The remaining 90% portion of the professional fee shall be subject to index-linked escalation at the anniversary marks of Month 12 (effective Month 13) and Month 24 (effective Month 25).
3. **Index Selection & Formula:** Price adjustments for the 90% components will be calculated objectively using the standard **Contract Price Adjustment Provisions (CPAP)** formula linked to official statistical indices published by **Statistics South Africa (Stats SA)**.
 - 3.1 *Applicable Index:* **Consumer Price Index (CPI) Headline [Table P0141]**.
 - 3.2 *Formula:*
$$P_a = P_t \times \left[0.10 + 0.90 \times \left(\frac{CPI_a}{CPI_b} \right) \right]$$
 - 3.3 *Where:* P_a = Adjusted Price; P_t = Tendered Base Price; CPI_a = CPI index actual at adjustment date; CPI_b = CPI index at base month (3 months prior to contract start).
4. **Exclusion of Disbursements:** All travel, subsistence, and accommodation allowances required for municipal site visits are **strictly excluded from this escalation formula**. Disbursements will be claimed separately on a cost-reimbursable basis, capped strictly in accordance with the prevailing **Department of Transport (DoT) vehicle tracking rates** and National Treasury travel frameworks.
5. **Application and Written Approval:** The bidder undertakes to submit formal CPA calculation dossiers to the MISA Accounting Officer 30 days prior to the effective anniversary date. No adjusted billing will be actioned until a formal contract addendum is signed by both parties.

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

1st Financial Year - 2026/2027					
Mpumalanga: • Ehlanzeni DM - Bushbuckridge, City of Mbombela, Nkomazi, Thaba Chweu • Gert Sibane DM - Dr Pixley Ka Isaka Seme, Mkhondo • Nkangala DM - Dr JS Moroka, Emakhazeni, Emalahleni, Steve Tshwete					
Deliverable Number	Description	Unit	Quantity	Rate (Rand)	Total item Price Rand
Stage 1	Initiation And Inception	No	10		

Stage 2	Powers and Functions between Authority WSA & WSP Capacity Assessment Report	No	10		
Stage 3	Assess Organogram Technical Directorates with Units including human resources responsible for operation of WWTW and WTW, Water & Sanitation Unit and Operations & Maintenance	No	10		
Stage 4	Assess Job Description, Professional Registration and Skills Audits	No	10		
Stage 5	Development of Skills and Capacity Plan	No	10		
Stage 6	Close Out Report with Recommendations of Training, Workshops and courses in addressing skills and capacity gaps	No	10		
Stage 7	Travel and accommodation costs	No	10		
Total					
VAT 15%					
Sub-Total Incl. VAT					

2nd Financial Year - 2027/2028

Gauteng:

- Sedibeng DM - Emfuleni, Lesedi, Midvaal
- West Rand DM - Merafong City, Mogale City, Rand West City

Free State:

- Fezile Dabi DM - Mafube, Metsimaholo, Moqhaka, Ngwathe
- Lejweleputswa DM – Masilonyana

Mpumalanga

- Nkangala District - Thembisile Hani, Victor Khanye

Deliverable Number	Description	Unit	Quantity	Rate (Rand)	Total item Price Rand
Stage 1	Initiation And Inception	No	13		
Stage 2	Powers and Functions between Authority WSA & WSP Capacity Assessment Report	No	13		
Stage 3	Assess Organogram Technical Directorates with Units including human resources responsible for operation of WWTW and WTW, Water & Sanitation Unit and Operations & Maintenance	No	13		
Stage 4	Assess Job Description, Professional Registration and Skills Audits	No	13		
Stage 5	Development of Skills and Capacity Plan	No	13		
Stage 6	Close Out Report with Recommendations of Training, Workshops and courses in addressing skills and capacity gaps	No	13		
Stage 7	Travel and accommodation costs	No	13		
Total					
Annual escalation					
VAT 15%					
Sub-Total Incl. VAT					

3rd Financial Year - 2028/2029**Free State:**

- Lejweleputswa DM – Matjhabeng, Nala, Tokologo, Tswelopele
- Thabo Mofutsanyana DM - Dihlabeng, Maloti-a-Phofung, Mantsopa, Nketoana, Phumelela, Setsoto
- Xhariep DM - Kopanong, Letsemeng, Mohokare

Deliverable Number	Description	Unit	Quantity	Rate (Rand)	Total item Price Rand
Stage 1	Initiation And Inception	No	13		
Stage 2	Powers and Functions between Authority WSA & WSP Capacity Assessment Report	No	13		
Stage 3	Assess Organogram Technical Directorates with Units including human resources responsible for operation of WWTW and WTW, Water & Sanitation Unit and Operations & Maintenance	No	13		
Stage 4	Assess Job Description, Professional Registration and Skills Audits	No	13		
Stage 5	Development of Skills and Capacity Plan	No	13		
Stage 6	Close Out Report with Recommendations of Training, Workshops and courses in addressing skills and capacity gaps	No	13		
Stage 7	Travel and accommodation costs	No	13		
Total					
Annual escalation					
VAT 15%					
Sub-Total Incl. VAT					

Summary

1st Financial Year - 2026/2027. Sub-Total Incl. VAT	
2nd Financial Year - 2027/2028. Sub-Total Incl. VAT	
3rd Financial Year - 2028/2029. Sub-Total Incl. VAT	
Grand Total for 36 municipalities (Bid/Tender Amount)	

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**

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

2.2.1 If so, furnish particulars:

.....
.....

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

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.

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.

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
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

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

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

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

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

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

The maximum points for this tender are allocated as follows:

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

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

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

2. DEFINITIONS

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

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

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

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

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

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

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

Where

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

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

3.2.1. POINTS AWARDED FOR PRICE

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

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

Where

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

4. POINTS AWARDED FOR SPECIFIC GOALS

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

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

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

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

The specific goals allocated points in terms of this 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)	Evidence
Women-owned enterprise: 51% or more ownership by women	8		Certified ID copies of Directors + CIPC Company Registration Documents
Enterprise owned by Persons with Who are youth (51% or more)	6		Certified ID copies of Directors + CIPC Company Registration Documents
B-BBBEE status level contributors from level 1 to 2 which are QSE or EME	6		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
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-owned enterprise: 51% or more ownership by women	Certified ID copies of Directors + CIPC Company Registration Documents
Enterprise owned by Persons with Who are youth (51% or more)	Certified ID copies of Directors + CIPC Company Registration Documents
B-BBBEE status level contributors from level 1 to 2 which are QSE or EME	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

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:

.....

.....

.....

.....