sport, arts & culture
Department:
Sport, Arts and Culture
REPUBLIC OF SOUTH AFRICA

uMsunduzi
MUSEUM · ISIGCINAMAGUGU
An entity of the Department of Sport, Arts and Culture

REQUEST FOR TENDER (RFT)

MST 01 OF 2024

APPOINTMENT OF INTERNAL AUDIT SERVICES FOR UMSUNDUZI MUSEUM

BIDDER REFERENCE NUMBER	: MST 01 OF 2024
ISSUE DATE	: Friday, 20 September 2024
COMPURSOLY SITE BRIEFING	: Thursday, 03 October 2024 11H00
CLOSING DATE AND TIME	: Tuesday, 22 October 2024 AT 12H00
SUBMISSIONS DELIVERY	: UMSUNDUZI MUSEUM 351 Langalibalele Street (Opposite Natalia Building) Pietermaritzburg 3201
FOR ENQUIRIES	: **Mr Msizi Mfeka** **Senior Finance Officer** **033 394 6834 (t)** **Email: mmfeka@msunduzimuseum.org.za**
	: Mr Phumlani Mvubu **Finance Manager** **033 394 6834 (t)** **Email: pmvubu@msunduzimuseum.org.za**

PLEASE NOTE THAT ALL QUERIES MAYE BE EMAILED TO THE ABOVE LISTED INDIVIDUALS FROM 03 OCTOBER 2024 TO 18 OCTOBER 2024 (CUT-OFF DATE). QUERIES RECEIVED AFTER THE CUT-OFF DATE WILL NOT BE ADDRESSED.

BIDDER NAME	

BIDDER STAMP :

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1. INVITATION AND BID SUBMISSION

UMsunduzi Museum is an agency of the Department of Sport, Arts and Culture and is a schedule 3A public entity that is constituted and mandated in terms of the Cultural Institutions act 119 of 1998. The museum's executive authority is the Minister of Sport, Arts and Culture who appoints the Council.

This **request for tender** MST 01 of 2024 must be completed and all applicable pages returned as part of your tender submission. **Please note the following:**

1.1 Do not retype or substitute in any other form

1.2 All tender forms must be completed and signed in original ink. Forms with photocopied signatures/initials or any other such reproduction of detail will be rejected, resulting in the tender being disqualified.

1.3 The tenders will be evaluated using the **two-envelope system**. Submit the tender in two separate sealed envelopes or suitable containers if necessitated and marked as follows "envelope 1: tender documents" and "envelope 2: financial offer", your company name as well as this tender reference number **(MST 01 of 2024) must be written** on both envelopes.

1.4 Tenderers should ensure that tenders are delivered timeously to the correct address and placed in the tender box at **Museum Reception**, **Monday to Friday 07h30 – 16h00.**

1.5 Tender documents must only be deposited in the tender box identified as a tender box of the uMsunduzi museum. Tender can also be couriered to the following address by no later than the closing date and time: **22 OCTOBER 2024 AT 12H00**.

uMsunduzi Museum
351 Langalibalele Street (Opposite Natalia Building)
PIETERMARITZBURG
3201.

Tenders received after the closing date and time will **not be accepted** for consideration.

Tenders submitted by telegram, facsimile, post or by electronic means such as email will not be accepted for consideration.

1.6 BID VALIDITY DATE: 120 DAYS

UMsunduzi Museum will publish the award of this tender in the government e-tenders and/or applicable media as required. Service providers should note the award of the tender as published.

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A service level agreement will be entered into between the successful bidder and uMsunduzi Museum after the award.

2. OBJECTIVE OF THE INTERNAL AUDIT FUNCTION

This bid aims to appoint a suitable, independent service provider that can provide an internal audit service for the Accounting Authority and Management of uMsunduzi Museum. In terms of the Public Finance Management Act (PFMA), the public entity should have an effective internal audit function, which should also comply with the Institute of Internal Auditors' (IIA) standards.

The internal audit function must assist the Museum to accomplish its objectives by bringing a systematic and disciplined approach to evaluating and improving the effectiveness of risk management control and governance processes. The Risk Management Strategy, including the Fraud Prevention Plan, must be used to direct the internal effort. This must be done through furnishing analyses, appraisals, recommendations, counsel and information concerning the activities that have been reviewed as well as regular follow-ups.

Other of the internal audit function, which are subject to an evaluation, are to review the following:

2.1 Internal control processes
2.2 The information systems environment
2.3 The reliability and integrity of financial and operational information
2.4 The effectiveness of operations of uMsunduzi Museum
2.5 Compliance with laws, regulations, policies, contracts and controls
2.6 The safeguarding of assets
2.7 The economical and efficient use of resources
2.8 The achievement of established operational goals and objectives
2.9 Assist the Audit Committee and Risk Committee through it the Accounting Authority and Management, in the effective discharge of their responsibilities.

3 SCOPE OF INTERNAL AUDIT

The Terms of Reference (TOR) below are intended to provide a scope of work and deliverables to Internal Auditors in terms of Public Finance Management Act of 1999 as amended by Act 29 of 1999 (PFMA) and in terms of Treasury Regulations and guidelines. The scope of the internal audit function includes the points listed below. However, should any other function be regarded as imperative by the tenderer, it should be added and clearly defined. The internal audit function must in consultation with uMsunduzi Museum Management prepare the following:

3.1 A rolling three-year (3) strategic Internal Audit Plan based on its assessment of key areas of risk for the Museum, having taken into consideration the current operations, the operations proposed in its corporate or strategic plan and its risk management strategy.

3.2 An annual (1) Internal Audit Plan.

3.2.1 Plans indicating the scope, cost and timelines of each audit in the annual internal audit.

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3.2.2 Quarterly audit reports directed to Management and the Audit and Risk Committee (ARC) detailing its performance against the plan to allow effective monitoring and intervention, when necessary.

3.2.3 The internal audit function must assist the Accounting Authority in maintaining effective controls by evaluating those controls and developing recommendations for enhancement or improvement.

3.3 It must assist the Accounting Authority in achieving the objectives of the uMsunduzi Museum by evaluating and developing recommendations for the enhancement or improvement of the processes through which:

3.3.1 Objectives and values are established and communicated;

3.3.2 The accomplishment of objectives is monitored;

3.3.3 Accountability is ensured

3.3.4 Corporate values are preserved;

3.3.5 The adequacy and effectiveness of the system of internal control are reviewed and appraised;

3.3.6 The relevance, reliability and integrity of management, financial and operating data and reports are appraised

3.3.7 Systems established to ensure compliance with policies, plans, procedures, statutory requirements and regulations, which could have a significant impact on operations, are reviewed;

3.3.8 The means of safeguarding assets are reviewed and deemed as appropriate in verifying the existence of such assets

3.3.9 The efficiency and effectiveness with which resources are employed are appraised;

3.3.10 The results of operations or programmes are reviewed to ascertain whether they are consistent with the Museum's established objectives and goals and whether the operations or programmes are being carried out as planned;

3.3.11 The adequacy of established systems and procedures are assessed.

3.4 The audits that will need to be considered at the Museum are, among others:

3.4.1 IT security and systems process audit.

3.4.2 Conducting special assignments and investigations, on behalf of management or the Director, into any matter or activity affecting the probity, interest and operating efficiency of the Museum.

3.4.2 Audit designed to detect fraud.

3.5 The firm will be required to perform one (1) risk workshop throughout the duration of the contract however, as the circumstances warrant, a service may be requested to provider more than one workshop, upon which a fee will be charged separately.

3.6 Review of Annual Financial Statements (AFS) and assist the museum to comply with relevant GRAP standards.

4 FRAUD AND IRREGULARITIES

In planning and conducting its work, the Internal Auditor seeks to identify serious defects in the internal controls, which might result in possible malpractices. Any such defects must be reported immediately to the Director and/or the Audit Committee, without disclosing these to any other staff. This also applies to instances where serious fraud and irregularities is uncovered. Although investigating fraud and other

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related irregularities are not the primary focus of internal audits approach, a close liaison with Management will be maintained should such issues be identified. Such cases will be referred accordingly for forensic auditing.

5 MONITORING PROGRESS OF ASSIGNMENTS

On completion of each assignment, the Auditor shall distribute the reports to Management, ARC and the Director. On a quarterly basis, a report on progress against the plan, significant findings and administrative matters will have to be presented to the Audit Committee. The Engagement Partner and/or Senior Manager must attend all Audit Committee meetings.

6 DURATION OF CONTRACT

The contract is expected to run for **(3)** three years, commencing on the date of signing the Service Level Agreement. It will, however, be subject to a review of the previous year's performance against the Internal Audit Plan. The successful tenderer should be able to start from 01 April 2025.

7 EVALUATION CRITERIA

80/20 evaluation criteria will be applicable as per specific goals attached on SBD.6.1 in accordance with the Preferential procurement Regulations, 2022.

8. TENDER EVALUATION SPECIFICATIONS AND PROCESS

PHASE 1: Minimum Qualification Criteria

The tenderer must meet the following competency requirements to qualify:

8.1 The firm must be independent from uMsunduzi Museum and its Directors and be able to maintain its independence throughout the engagement.

8.2 The firm must be registered as a public auditor in public practice with the Independent Regulatory Board of Auditors (IRBA) as well as South African Institute of Chartered Accountants (SAICA) or the firm must provide evidence of a satisfactory result on their latest IRBA review results for the firm and for the engagement partner.

8.3 The firm may also be registered with the Institute of Internal Auditors South Africa (IIASA). The firm must provide evidence of this registration.

8.4 The firm must perform internal audits in accordance with the International Professional Practices Framework (IPPF) promulgated by the Institute of Internal Auditors (IIA). The Firm must provide evidence of a satisfactory result on their External Quality Assurance review performed within at least the last 5 years.

8.5 The firm's public liability insurance and professional indemnity insurance including names of insurer, policy numbers, expiry date and limits of any one incident.

PHASE 2: Technical Evaluation

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Functionality of the bids will be evaluated according to the predetermined evaluation criteria set out in the Evaluation Criteria below. During this stage tenderers will be evaluated for functionality in two stages:

8.6 The tenderer must obtain a minimum overall score of **45 out of 70** points for functionality to move to the next stage of evaluation; those tenderers who fail to meet the minimum qualifying score will be disqualified from the process.

8.7 Tenderers will not evaluate themselves but need to ensure that all information is supplied as required

8.8 The Bid Evaluation Committee (BEC) will evaluate technical and functional requirements and score all the bids as per the set criteria.

After fulfilling the minimum qualification criteria as set out above for the Internal Audit services, the short-listed firms will be evaluated in terms of the following criteria:

a. **Professional competence and integrity** – The firm should be professional and competent in the practice of internal audit (attest function) as well as have high ethical standards.
b. **Relevant Experience** – have at least five (5) years' experience in conducting government or similar audits. A firm which is familiar with the regulatory environment under which the Museum operates will be preferred. Knowledge of and exposure to the PFMA and Treasury Regulations and guidelines are non-negotiable as the Auditor General has specific requirements that auditors must cover.
c. **Independence and objectivity** – No conflict of interest must exist between partners and staff members of the firm, Council and staff members of uMsunduzi Museum. A detailed statement on the independence of the tenderer and the proposed Internal Audit Team is required.
d. **Track record and reputation** – Preference will be given to a firm that has demonstrated technical ability, a good track record and reputation in the industry.
e. **Size of the Firm** – A firm with at least 3 partners at least one partners who must be a member of South African Institute of Chartered Accountants (SAICA) and IRBA. Key audit team members responsible for the Museum's audits must be registered with the IIA.
f. **Capacity to conduct audits at uMsunduzi Museum** – Regard will be given to the availability of staff to be assigned to the Museum to perform ongoing internal audit engagements.
g. **Capacity to conduct Information Technology audits** – The firm must have in-house IT Auditor/s with at least (3) three years' s experience in the auditing of IT general and application controls as well as large scale IT projects. If not, undertakings to sub contract this function.
h. Commitment to follow National Treasury Guidelines applicable to service providers of the public entities.

9 PRICING AND EVALUATION CRITERIA

Phase 3: Preference Point system

Evaluation criteria will be applicable as per specific goals attached on SBD.6.1 in accordance with the Preferential procurement Regulations, 2022. The 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included).

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Bidders must provide an amount of what the internal audit service for 36 months will cost in the table below.

PRICING SCHEDULE

PRICING SCHEDULE	YEAR ONE	YEAR TWO	YEAR THREE	TOTAL
Pricing must be inclusive of all relevant overheads including planning, travel costs, including VAT.	R	R	R	R

10 EVALUATION OF PROPOSAL

The evaluation of technical proposals will be based on their responsiveness to the scope of internal audit, applying the evaluation criteria and point system indicated below. Each responsive proposal will be given a technical score. A proposal considered unsuitable shall be rejected at this stage if it does not respond to important aspects of the scope of internal audit. The Museum shall notify bidders of the rejection of their technical proposal after completing the selection process. The Bid Evaluation Committee (BEC) will evaluate technical and functional requirements and score all the bids as per the set criteria.

Technical Proposal evaluation criteria and point system
A minimum of 64% (45 out of 70) will be required in the technical proposal to qualify. Bidders who do not meet the 64% requirement will be disqualified based on the criteria set out below:

Functionality formula

$$Ps = \frac{So}{Ms} \times 100$$

Preference Point system formula

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

<u>The minimum points are 45 points out of 70 points</u>

NO.	FUNCTIONALITY	CRITERIA	MAX POINTS	POINTS SCORED
1	**Audit Plan and Methodology** A detailed proposed plan in executing of audits over 36 months.	Detailed plan to meet scope of work clearly depicting understanding of museum requirements = 15 points No plan = 0 points	**15**	
2	**Experience within the last 10 years** Firm's experience in Public Entities subject to PFMA, Knowledge of GRAP, Audit Predetermined Objectives, and Performance Audits.	Over 5 years (15 points) 3-5 years (10 points) 1-2 years (5 points) No experience (0 points)	**15**	
3	**Contactable References** Contactable references pertaining to the firm's experience in public entities. (PFMA, GRAP, Audit of Predetermined Objectives, and Performance Audits). Note: references should be presented in a form of a written letter on an official letterhead from previous clients where similar services were performed.	3 or more contactable references (10 points) 1-2 contactable references (5 points) No contactable references (0 points)	**10**	
4	**Qualifications** Qualifications of team members that will be allocated to uMsunduzi Museum. Please attach CVs of the team. Manager/ Supervisor – Qualified Auditor / CA / Clerks/Trainee	Manager/ Supervisor who is a qualified Auditor / CA (15 points) Clerks/ trainees with Hons (10 points) B-com, Diploma (5 points) No qualification - (0 points) **NB: Please provide proof certified certificates and registration with the professional body**	**15**	
5	**Size of the firm** A firm must have partners who are registered with SAICA and IRBA	At least 3 or more partners registered with SAICA and IRBA (15 points). At least 2 partners registered with SAICA and IRBA (10 points) At least 1 partner registered with SAICA and IRBA (5 points) No partners registered with SAICA and IRBA (0 points)	**15**	

Tender Evaluation Criteria and Scoring Price and BBBEE			
Evaluation criteria	**Deliverables**		**Points**
Price	**The lowest responsive and responsible**	**80**	**Points**
Preference Points	In terms of Regulation 4 (2) and 4 (2) of the Preferential Procurement Regulations, preference points may be awarded to a bidder for the specific goal specified for the tender in accordance with the table below.	20	points
	Black Ownership	12	Points
	Women Ownership	4	Points
	Disability Ownership	2	Points
	Youth Ownership	2	Points
	Non-complaint	0	Points

Black Ownership	**% of Preferential points**
Bidder with 100% black ownership	100%
Bidder with 51% to 99% black ownership	50%
Bidder with less than 51% black ownership	25%
Bidder with no black ownership	0%
Woman ownership	**% of Preferential points**
Bidder with 100%-woman ownership	**100%**
Bidder with 51%-to-99%-woman ownership	**50%**
Bidder with less than 51%-woman ownership	**25%**
Bidder with no woman ownership	**0%**

Disability Ownership	% of Preferential Points
Bidder with 100% disability ownership	**100%**
Bidder with 51% to 99% disability ownership	**50%**
Bidder with less than 51% disability ownership	**25%**
Bidder with no disability ownership	**0%**
Youth Ownership	**% of Preferential Points**
Bidder with 100% youth ownership	**100%**
Bidder with 51% to 99% youth ownership	**50%**
Bidder with less than 51 % youth ownership	**25%**
Bidder with no youth ownership	**0%**

PART A
INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (*NAME OF DEPARTMENT/ PUBLIC ENTITY*)					
BID NUMBER:	**MST 01 OF 2024**	CLOSING DATE:	**22 October 2024**	CLOSING TIME:	**12H00**
DESCRIPTION	**uMsunduzi Museum Internal Audit**				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT *(STREET ADDRESS)*					
uMsunduzi Museum, 351 Langalibalele Street, Pietermaritzburg 3201					

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO		**TECHNICAL ENQUIRIES MAY BE DIRECTED TO:**	
CONTACT PERSON	**Mr. Msizi Mfeka**	CONTACT PERSON	**Mr. Phumlani Mvubu**
TELEPHONE NUMBER	**+27 (0)33 394 6834**	TELEPHONE NUMBER	**033 394 6834/5**
FACSIMILE NUMBER		FACSIMILE NUMBER	
E-MAIL ADDRESS	**mmfeka@msunduzimuseum.org.za**	E-MAIL ADDRESS	**pmvubu@msunduzimuseum.org.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
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	☐Yes ☐No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?	☐Yes ☐No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]	

QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS

IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? ☐ YES ☐ NO

DOES THE ENTITY HAVE A BRANCH IN THE RSA? ☐ YES ☐ NO

DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA? ☐ YES ☐ NO

DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA? ☐ YES ☐ NO

IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? ☐ YES ☐ NO

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

PART B
TERMS AND CONDITIONS FOR BIDDING

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

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

SIGNATURE OF BIDDER: ……………………………………………

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

DATE: ……………………………

SBD 3.3

PRICING SCHEDULE
APPOINTMENT OF INTERNAL AUDIT SERVICES FOR UMSUNDUZI MUSEUM

NAME OF BIDDER: ……………………………………………………………………………………………BID NO.: ……………………………………

CLOSING TIME **12h00** CLOSING DATE……………………...

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

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

1\. The accompanying information must be used for the formulation of proposals.

2. Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project. R………..…………………………………………………...

3. PERSONS WHO WILL BE INVOLVED IN THE PROJECT AND RATES APPLICABLE (CERTIFIED INVOICES MUST BE RENDERED IN TERMS HEREOF)

4. PERSON AND POSITION HOURLY RATE DAILY RATE

--- R-------------------------
----- ---------------------------------

--- R-------------------------
----- ---------------------------------

--- R-------------------------
----- ---------------------------------

--- R-------------------------
----- ---------------------------------

--- R-------------------------
----- ---------------------------------

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

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

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

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

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

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

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT
---		……………….	…………….. R………………..
---		……………….	…………….. R………………..
---		……………….	…………….. R………………..
---		……………….	…………….. R………………..

TOTAL: R………………………………………………….

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

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

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT
---		……………….	…………….. R………………..
---		……………….	…………….. R………………..
---		……………….	…………….. R………………..
---		……………….	…………….. R………………..

TOTAL: R………………………………………………….

6. Period required for commencement with project after acceptance of bid ……………………………………………………………….

7. Estimated man-days for completion of project ……………………………………………………………….

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

9. If not firm for the full period, provide details of the basis on which

adjustments will be applied for, for example consumer price index. …………………………………………………………………….

…………………………………………………………………….

…………………………………………………………………….

……………………………………………………………………

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

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

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

2. Bidder's declaration

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

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

Full Name	**Identity Number**	**Name of State institution**

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

2.2.1 If so, furnish particulars:

…………………………………………………………………………………………
…………………………………………………………………………………………

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

2.3.1 If so, furnish particulars:

…………………………………………………………………………………

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.

………………………………………………………………………………….

3 DECLARATION

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

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

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

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

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

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

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

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

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.
I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF

PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING

ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE

TO BE FALSE.

……………………………… ..……………………………………………
Signature Date

……………………………… ………………………………………………
Position Name of bidder

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.

SBD 6.1

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

This preference form must form part of all bids invited. It contains general information and serves as a claim form for preference points for specific goals outlined in point 3 below.

NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF SPECIFIC GOALS, AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022.

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1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to this bid:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included).
- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included). The lowest acceptable will be used to determine the applicable preference point system

1.2 Points for this bid shall be awarded for:

(a) Price; and

(b) Preference Points based on specific goals.

1.3 The maximum points for this bid are allocated as follows:

	POINTS
PRICE	80
Preference Points	20
Total points for Price and Preference Points must not exceed	**100**

1.4 Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor together with the bid, will be interpreted to mean that preference points are not claimed.

1.5 The Museum 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 Museum.

2. POINTS AWARDED FOR PRICE

2.1 THE 80/20 PREFERENCE POINT SYSTEMS

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

80/20

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

Where

Ps = Points scored for price of bid under consideration

Pt = Price of bid under consideration

Pmin = Price of lowest acceptable bid

3. PREFERENCE POINTS AWARDED

3.1 In terms of Regulation 4(2); 5(2); 6(2) and 7 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for the specific goals specified of tender in accordance with the table below:

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

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

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

The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Black Ownership		12		
Women Owned		4		
Youth Owned		2		
Disability Owned		2		
Non-complaint		0		

Preference points for black ownership will be awarded as follows:

Black Ownership	% of Preferential Point
Bidder with 100% black ownership	100%
Bidder with 51% to 99% black ownership	50%
Bidder with less than 51% black ownership	25%
Bidder with no black ownership	0%

4. **DECLARATION WITH REGARD TO COMPANY/FIRM**

4.1 Name of company/firm:……………………………………………….

4.2 VAT registration number:……………………………………….……………

4.3 Company registration number:…………….……………………….………

4.4 TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One person business/sole propriety
- ☐ Close corporation
- ☐ Company
- ☐ (Pty) Limited

[TICK APPLICABLE BOX]

4.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

……
……
……
……………………………………………………………

4.6 COMPANY CLASSIFICATION

- ☐ Manufacturer
- ☐ Supplier
- ☐ Professional service provider
- ☐ Other service providers, e.g. transporter, etc.

[*TICK APPLICABLE BOX*]

4.7 Total number of years the company/firm has been in business:……………………

4.8 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 specific goals of contributor indicated in paragraphs 1.4 and 3.1 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 and specific goals 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 1.3 and 3.1, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;

iv) If the preference points of contributor 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) recommend that the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury 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.

……………………………………….
SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME……………………………………………………….
DATE: ………………………………………………………
ADDRESS: ………………………………………………………
……………………………………………………….
……………………………………………………….
……………………………………………………….

SBD 7.2

CONTRACT FORM - RENDERING OF SERVICES

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

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

1. I hereby undertake to render services described in the attached bidding documents to (name of the institution) ……………………………………. in accordance with the requirements and task directives / proposals specifications stipulated in Bid Number………….………. at the price/s quoted. My offer/s remain binding upon me and open for acceptance by the Purchaser during the validity period indicated and calculated from the closing date of the bid .

2. The following documents shall be deemed to form and be read and construed as part of this agreement:

(i) Bidding documents, *viz*
- Invitation to bid;
- Tax clearance certificate;
- Pricing schedule(s);
- Filled in task directive/proposal;
- Preference claims for Broad Based Black Economic Empowerment Status Level of Contribution in terms of the Preferential Procurement Regulations 2011;
- Declaration of interest;
- Declaration of bidder's past SCM practices;
- Certificate of Independent Bid Determination;

- Special Conditions of Contract;

(ii) General Conditions of Contract; and

(iii) Other (specify)

3. I confirm that I have satisfied myself as to the correctness and validity of my bid; that the price(s) and rate(s) quoted cover all the services specified in the bidding documents; that the price(s) and rate(s) cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.

4. I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this agreement as the principal liable for the due fulfillment of this contract.

5. I declare that I have no participation in any collusive practices with any bidder or any other person regarding this or any other bid.

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

NAME (PRINT) ……………………….

CAPACITY …………………………….

SIGNATURE …………………………….

NAME OF FIRM ……………………….

DATE …………………………….

WITNESSES

1 …….…………………………….
.

2 ……….………………………….
.

SBD 7.2

CONTRACT FORM - RENDERING OF SERVICES

PART 2 (TO BE FILLED IN BY THE PURCHASER)

1. I……………………………………………. in my capacity as……………………...………………………………..
accept your bid under reference number ………………dated………………………for the rendering of services indicated hereunder and/or further specified in the annexure(s).

2. An official order indicating service delivery instructions is forthcoming.

3. I undertake to make payment for the services rendered in accordance with the terms and conditions of the contract, within 30 (thirty) days after receipt of an invoice.

DESCRIPTION OF SERVICE	**PRICE (ALL APPLICABLE TAXES INCLUDED)**	**COMPLETION DATE**	**B-BBEE STATUS LEVEL OF CONTRIBUTION**	**MINIMUM THRESHOLD FOR LOCAL PRODUCTION AND CONTENT (if applicable)**

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

SIGNED AT ………………………………………ON………………………………..

NAME (PRINT) ………………………………………….

SIGNATURE ………………………………………………

OFFICIAL STAMP

WITNESSES
1 ……………………………….
2 …..…………………………….
DATE: ……………………………...

SBD 8

DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

1 This Standard Bidding Document must form part of all bids invited.

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

SBD 8

CERTIFICATION

I, THE UNDERSIGNED (FULL NAME) …………………………………………………

CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM IS TRUE AND CORRECT.

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

………………………………………... **…………………………..**

Signature **Date**

………………………………………. **…………………………..**

Position **Name of Bidder**

Js365bW

SBD 9

CERTIFICATE OF INDEPENDENT BID DETERMINATION

1 This Standard Bidding Document (SBD) must form part of all bids[1] 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 *pe 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:

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

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

SBD 9

CERTIFICATE OF INDEPENDENT BID DETERMINATION

I, the undersigned, in submitting the accompanying bid:

____

(Bid Number and Description)

in response to the invitation for the bid made by:

____

(Name of 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;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign the bid, on behalf of the bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word “competitor” shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:

   (a) has been requested to submit a bid in response to this bid invitation;

   (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and

   (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder

6. The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium[3] will not be construed as collusive bidding.
7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
   - (a) prices;
   - (b) geographical area where product or service will be rendered (market allocation)
   - (c) methods, factors or formulas used to calculate prices;
   - (d) the intention or decision to submit or not to submit, a bid;
   - (e) the submission of a bid which does not meet the specifications and conditions of the bid; or
   - (f) bidding with the intention not to win the bid.
8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.
9. The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

[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.

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.

…………………………………………………   …………………………………

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

Js914w 2