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## **INVITATION FOR PROPOSALS**

**BID NO: MGSLG/202311/IA2P**

**CLOSING DATE: 28 NOVEMBER 2023, 11:00**

**TENDER NAME: THE APPOINTMENT OF TWO SERVICE PROVIDERS TO  
CONDUCT IMPACT ASSESSMENT FOR TWO SELECTED PROGRAMMES  
ACROSS THE MGSLG**

**MATTHEW GONIWE SCHOOL OF LEADERSHIP & GOVERNANCE (MGSLG)**

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## 1. INTRODUCTION

The Matthew Goniwe School of Leadership and Governance (MGSLG), an agency of the Gauteng Department of Education (GDE), was established in 2003 to serve as the capacity-building arm of the GDE to provide empirical and research-based quality intervention programmes to develop the capacity of School Governing Bodies (SGBs) and School Management Teams (SMTs). The mandate of MGSLG has since expanded in its scope to include District Officials, educators, learners (RCL members) and parents.

MGSLG, as the Provincial Training Development Institute (PTDI) is responsible for continuing professional development. The PTDI plays a critical role in providing capacity building for the provincial education stakeholders. It is therefore of primary importance to conduct monitoring and evaluation of the effectiveness of the programmes and to establish how to improve programmes effectiveness. The evaluation is intended to shed a light on the implementation analysis and change that has taken place as a result of the implementation of the three programmes

## 2. PURPOSE OF THE EVALUATION

The main purpose of the evaluation is to assess whether the **two programmes** are being implemented in a way that is likely to result in change and benefits for the end users. It must be noted that the Early Childhood Development (ECD) programme is for the ECD phase, and Secondary School Improvement Programme C (SSIP C) for the FET phase of the schooling system in the South African education system.

Therefore, the main purpose of these Terms of Reference is to assist MGSLG to acquire the services of experienced and qualified service provider/s to conduct Impact assessment studies on **two (2) selected** programmes that have been assessed for evaluability and have been delivered by MGSLG over a period exceeding the three years as prescribed in the Government Wide Monitoring and Evaluation framework.

The main objective of the evaluation is to conduct and report on a provincial representative survey of ECD NQF level 4, and the SSIP C.

### 3. OBJECTIVES

The objective of the evaluation is to:

- 3.1. Establish if the two programmes are implemented as planned.
- 3.2. Conduct an independent assessment of the effectiveness of MGSLG training on **two** programmes (ECD: NQF level 4, SSIP C for Schools (underperforming schools / schools at risk) that have been delivered over a period of time by MGSLG. (Between 2019 and 2022)
- 3.3. establish the efficacy and need of these programmes whereby the findings from the studies will assist MGSLG to make informed decisions to strengthen its design, delivery, monitoring, and evaluation (including materials, methodologies, indicators, and logistics).
- 3.4. conduct an independent assessment of the impact on the knowledge and skills application resulting from MGSLG training.
- 3.5. identify gaps and strengthen the evidence base for future programme development and delivery.

### 4. SCOPE OF THE EVALUATION

The scope of services covers the following:

1. The service provider/s are to carry out the effectiveness and impact assessment of the above **two** pre-selected MGSLG training programmes. Before fieldwork, the consultant should go through all the training materials, manuals, plans, and reports related to the programmes selected.
2. The consultants should also study the training impact assessments and research previously undertaken and all other relevant project documentation, especially work plans and progress reports concerning the Financial Years 2019, 2020 and 2021 . Moreover, the service Provider/s should interview the relevant GDE District and Head Office in respect to the delivery of MGSLG Programmes.
3. After careful desk research, the consultants should design the methodology and assessment tools and then carry out field work in the Province. The idea is to find out how the trainees who participated in the two selected training occasions have been performing in their duties and are performing at the time of the evaluation.
4. The Evaluation **IS INTENDED** to respond to the following questions:
  - 4.1. Are the programmes implemented as planned?
  - 4.2. Are the programmes effective? Are the programmes relevant to the needs of the beneficiaries/addressing the needs of the department?
  - 4.3. Are the programmes reaching the intended beneficiaries?
  - 4.4. How can MGSLG make the programmes better?

## 5. METHODOLOGY/EVALUATION APPROACH

The prospective Service Provider/s should also propose specific methods appropriate for answering the evaluation questions in section 4 above.

It is recommended that the component of the implementation and impact should be a Provincial representative sample of the education sites. A mixed method should be used i.e. both qualitative and quantitative. Amongst others, the approach should include the following:

### 5.1 Document Review

There should be a review of strategic programme documents including policy, framework, guidelines, reports and evaluations. In addition, a review of assessments, monitoring and evaluation documents on the programmes.

### 5.2 Literature Review / Benchmarking

A review on international LITERATURE should be done as follows:

#### 5.2.1 ECD:

- Look at how other countries develop their Early Childhood Practitioners
- How are ECD qualifications/ capacity building programmes implemented
- identify several key characteristics and contextual factors that typically determine the effectiveness of the ECD Programme in capacitating ECD Practitioners

#### 5.2.2. school improvement for schools at risk

- How underperforming schools are developed to improve their performance.
- Which areas are focused on in the school improvement programmes
- What are lessons for MGSLG to take from the literature?

5.2.3. In addition, previous evaluations, and literature on evaluation programmes should be reviewed.

This exercise should inform the Theory of Change (ToC) and M &E instruments.

### 5.3 Interviews

Interviews should be conducted with key officials, school stakeholders, districts officials and SGBs.

### 5.4 Sample size

A stakeholder survey should be administered and should be guided by the developed Theory of Change.

### 5.5 Sample survey /data collection

Conduct a school based survey administered to school stakeholders; ECD practitioners ; school based staff and School Management Teams (SMTs). This may include an inspection of documents and facilities at schools where appropriate. (The Theory of Change Should inform the questionnaire development process).

### 5.6 Utilisation of Mixed Method /data collection

Ability to utilize both quantitative and qualitative data analysis from the selected sample is of importance.

## 5.7 Learning Process

A reflective process with the MGSLG officials and other stakeholders workshop to reflect on the lessons, emerging findings and how the programmes can be strengthened should be held.

## 5.8 Review of the Theory of Change and Logical Framework of the two programmes

5.8.1 Propose an initial Theory of Change and logical framework of the programmes and submit a revised theory of change at the end of the evaluations.

5.8.2 Recommend how the programmes should be revised /strengthened. Recommendations should be specific and practical, remembering that improvement plans will be developed following the evaluations.

MGSLG reserves the right to subject the work of the appointed service provider for external peer review as part of quality assurance process in the implementation of the project.

## 6. OUTPUTS AND DELIVERABLES

The following outputs and deliverables are expected from the appointed Service Provider:

6.1 Based on the desktop research study and interviews with the selected GDE teams, the service Provider should produce:

6.1.1 Inception report including the following:

6.1.1.1 Literature review and definitions of terms and concepts.

6.1.1.2 Detailed approach and methodology to conduct the assessments.

6.1.1.3 Detailed time and activity schedule.

6.1.1.4 Assessment questionnaires and tools

6.2. On the basis of the feedback from the desktop research study findings plus field work to collect and analyse the data, the consultants should produce:

6.2.1. Final report not exceeding 100 pages excluding appendices, including at least:

6.2.2. An executive summary of the rationale for the assessment, the approach and methodology applied, and the main findings and recommendations.

6.2.3. An assessment of the effectiveness of the MGSLG training in enabling Educators and SMT Members at the different levels to effectively know and implement the learning objectives of the training. (Assess training objectives against learning outcomes).

6.3. Recommendations with respect to design, delivery, monitoring, and evaluation of the MGSLG training, informed by the effectiveness assessment.

6.4. An assessment of the short- and long-term impacts of the knowledge and skills developed (because of the MGSLG training)

- 6.5. Recommendations with respect to strengthening the impact of the MGSLG training on the wider scale of delivery of Programmes
- 6.6. Overall report summarizing findings and recommendations from all Regions of the Province.

## 7. EVALUATION PROCESS

The Evaluation Process comprises the following stages:

### 7.1 Pre-evaluation stage/ mandatory documents

- During this phase bid documents will be reviewed to determine compliance with tax matters and whether original and valid tax clearance certificates have been submitted with the bid documents at closing date and time of bid.

Bidders must attach the following mandatory returnable documents in order to be considered for this bid:

- Original and valid tax clearance or Printed copy tax clearance certificate accompanied by a pin for further verification.
- Certified ID(s) copies of company director(s)
- Certified Proof of company registration
- Proof of registration on National Treasury Central Supplier Database (CSD) not older than one month.
- Company municipal rates, electricity or water account not older than three months, proof of Residential lease or rental or sworn affidavit if the business operates at a place of residence.
- Completed and signed Standard Bidding Document (SDB) attached in the tender document.
- Proof of company banking details e.g., bank letter with bank stamp, Company bank statement, code rating letter from the bank or any physical proof from the bank, the evidence must not be older than three months.
- Company profile with a minimum of 5 years' experience in working in the relevant field.

***Failure to submit all of the above-mentioned document will result to the disqualification of the bid.***

### 7.2 Stage 1: Technical/Functionality Evaluation

a) Bids will be evaluated strictly according to the bid evaluation criteria stipulated in this section of the Terms of Reference (ToR). During this stage bidders' responses will be evaluated for functionality based on achieving a minimum score of seventy five percent (75%). Bidders who obtain less than 75% in the functionality points will be regarded as non-responsive and will be eliminated from the evaluation process.

- b) Bidders must, as part of their bid documents, submit supportive documentation for all technical requirements as indicated in this document. The panel responsible for scoring the respective bids will evaluate and score all bids based on their submissions and the information provided.
- c) Bidders will not rate themselves but need to ensure that all information is supplied as required. The Bid Evaluation Committee (BEC) will evaluate and score all responsive bids and will verify all documents submitted by the bidders.
- d) The panel members will individually evaluate the responses received against the following criteria as set out below:

**7.3 Evaluation Criteria (This is at the preference of the author and the requirements of the request)**

NO.	CRITERIA	POINTS	WEIGHTS
	DESCRIPTION		20
1	<b>BIDDER'S RELEVANT EXPERIENCE:</b>		<b>10</b>
	<b>PART A:</b> Bidders must submit their business profile indicating years of experience in Monitoring and Evaluation AND Learning (MEL), and points will be allocated as follows:		
	5 years' experience in the field of Monitoring, Evaluation and Learning	6	
	6 - 9 years' experience in the field of MEL	8	
	10 years and above experience in the field of MEL	10	
	<b>PART B:</b> Reference letters or letters of recommendations. Bidders must submit the completed MGSLG template of reference by clients of previous similar work done on professional development and Monitoring and Evaluation of programs with various educational stakeholders or companies/institutions in the education sector. The experience must be related to scope of services as indicated in page 3 to 5 of this document, if not, the letter will not be considered. The reference must be signed and stamped by the relevant representative of the company that the service provider has rendered services to.		<b>10</b>
	One relevant and positive reference letter	2	
	Two relevant and positive reference letters	4	



	Three relevant and positive reference letters	6	
	Four relevant and positive reference letters	8	
	Five relevant and positive reference letters	10	
<b>2.</b>	<p><b>METHODOLOGY, TIMELINES AND PROJECT PLAN:</b> The service provide must provide a detailed methodology explaining project execution process that will cover all project scope of work and project milestones. The methodology must show timeline throughout the project lifecycle. The bidder must provide a methodology and framework for developing training and awareness campaign. The methodology must discuss in detailed the following:</p> <ul style="list-style-type: none"> <li>➤ Shows clear understanding of the scope and deliverables in the ToR's by providing a clear articulation of the project scope and timelines.</li> <li>➤ Highlight various theories that will be used in the project and how each theory will be applied in the project.</li> <li>➤ Outline an approach that will be undertaken sample units of analysis of the above identified programme beneficiaries.</li> <li>➤ Outline various methods to be used to access the MGSLG course beneficiaries across Regions.</li> <li>➤ Provide a clear outline of skills transfer to MGSLG staff</li> <li>➤ Provide previous work where the theory of change was recommended by the Company and applied by the client in such studies.</li> <li>➤ Provide a program management framework and communication plan.</li> </ul> <p>Points will be allocated based on the relevance of the project methodology which is structured as follows:</p> <p><b>Exceptionally</b> defined methodology indicating <b>all the above</b> elements and articulating a clear understanding of the scope, design activities, deliverable, programme beneficiaries and reporting schedules with realistic and reliable timelines</p> <p><b>Moderately</b> defined methodology with <b>eight</b> of the above elements articulated.</p> <p><b>Poorly</b> defined methodology with <b>five</b> elements articulated</p> <p>Submission with <b>four (4)</b> elements but <b>more than two</b>.</p> <p>Submission <b>with two and less elements</b></p>	50	<b>50</b>



<p>3.</p>	<p><b>EXPERIENCE, SKILLS, AND QUALIFICATIONS OF PROJECT TEAM:</b></p> <p><b>THE PROJECT TEAM</b></p> <p>The bidder’s key personnel of the proposed project team must have relevant qualifications, skills, and experience.</p> <p>The bidders must submit the CV(s) and certified copies of relevant qualification(s) for the project team, points will be allocated as follows:</p> <p><b>Project leader:</b></p> <p>Minimum of Eight years relevant qualification in MEL minimum of 8 years or more post qualification experience (Masters or Doctoral Degree).</p> <p><b>MEL Specialists: 5 specialists</b></p> <p>An Honours qualification(NQF level 8) and post qualification experience of between 3 -7 years in Monitoring, Evaluation and Learning.</p> <p><b>Specialists: 10 Field Specialists in the Data Science Field/ Statistics/ Econometrics</b></p> <p>A Bachelor’s Degree or National Diploma ( Data Sciences) and a Minimum of 3 years relevant experience in data collection and data analysis</p>		<p><b>30</b></p>
	<p>CVS OF PROJECT TEAM:</p> <p>CV of Project Leader and <b>five or more</b> MEL specialists and <b>10 or more</b> field data collectors and analysts,</p> <p>CV of Project Leader and <b>four</b> MEL specialists, and 6 -8 data collectors and analysts.</p> <p>CV of Project Leader and three or less MEL Specialists and less than 6 data collectors and analysts</p> <p>None</p>	<p>30</p> <p>25</p> <p>15</p> <p>0</p>	
<p><b>Total</b></p>			<p><b>100%</b></p>
<p><b>Minimum Qualifying Score</b></p>			<p><b>75%</b></p>

- e) Each panel member will rate each individual criterion as per the above point allocation scales:
- f) The value scored for each criterion will be multiplied with the specified weighting for the relevant criterion to obtain the marks scored for each criterion. These marks will be added and expressed as a fraction of the best possible score for all criteria.
- g) This score will be converted to a percentage and **only** bidders that have met or exceeded the minimum threshold of 75% for functionality will be evaluated and scored in terms of pricing and socio-economic goals as indicated hereunder.
- h) Any proposal not meeting a minimum score of 75 percent technical proposal will be regarded as non-responsive and it will not be evaluated further.

## 8. STAGE 2: PRICE/FINANCIAL EVALUATION

Price, inclusive of VAT, will be evaluated as indicated below.

- a) In terms of regulation 5 of the Preferential Procurement Regulations pertaining to the Preferential Procurement Policy Framework Act, 2000 (Act 5 of 2000), responsive bids will be evaluated by MGSLG on the 80/20 – preference point for Broad-Based Black Economic Empowerment in terms of which points are awarded to bidders on the basis of:
  - ☐ The bid price (maximum 80 points)
  - ☐ Broad-Based Black Economic Empowerment as well as specific goals (maximum 20 points)
- b) The following formula will be used to calculate the points for price in respect of bidders with a Rand value below R50 000 000.00:  

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

Where

$P_s$  = Points scored for comparative price of bid under consideration

$P_t$  = Comparative price of bid under consideration, inclusive of VAT

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

A maximum of 20 points may be awarded to a bidder for being a Broad-Based Economic Empowerment and/or subcontracting with a Broad-Based Black Economic Empowerment entity stipulated in the Preferential Procurement regulations. For this bid the maximum number of Broad-Based Black Economic Empowerment Status points that could be allocated to a bidder is indicated in the following section.

## 9. B-BBEE POINTS

The Preferential Procurement Policy Framework Act 2000 (PPPFA) Regulations were gazetted on 8 June 2011 (No. 34350) and effective from 7 December 2011. These regulations require bidders to submit valid original or certified copies of their B-BBEE Status Level Certificates from a SANAS accredited verification agency and accredited auditing firm. The 80/20 preference points systems will be applied since the bid is estimated to be below R50 Million in accordance with the formula and applicable points provided for in the respective status level contributor tables in the Regulations.

<b>B-BBEE Status Level of Contributor</b>	<b>Number of Points (80/20 System)</b>
1	20
2	18
3	16
4	10
5	8
6	6
7	4
8	2
Non-compliant Contributor	0

Failure to capture the required status level and to submit the certified or original B-BBEE status level certificates no points will be allocated to the service providers.

- a. The points scored by a bidder in respect of the points indicated above will be added to the points scored for price.
- b. Bidders are requested to complete the various preference claim forms in order to claim preference points.
- c. Only a bidder who has completed and signed the declaration part of the preference claim form will be considered for B-BBEE Status.
- d. Supply Chain Management may, before a bid is adjudicated or at any time, require a bidder to substantiate claims it has made with regards to B-BBEE Status.
- e. Points scored will be rounded off to the nearest 2 decimals.
- f. In the event that two or more bids have scored equal total points, the contract will be awarded to the bidder scoring the highest number of points for B-BBEE Status. Should two or more bids be equal in all respects, the award shall be awarded to the bidder who scored a highest functionality points, should two or more bids be equal after this, the

award shall be decided by drawing of lots..

- g.** A contract may, on reasonable and justifiable grounds, be awarded to a bid that did not score the highest number of points.
- h.** ***MGSLG reserves the right to arrange contracts with more than one contractor.***
- i.** ***MGSLG reserves a right to withdraw, cancel or not to award this tender.***

**Failure to submit all of the above-mentioned documents will result to the disqualification of the bid.**

The bidder should apply for registration on the MGSLG Supplier Database. Application forms for registration are available on the MGSLG Website [www.mgslg.co.za](http://www.mgslg.co.za) . The duly completed application form should be submitted together with the proposal.

## **10. COMMUNICATION**

Supply Chain Management (SCM) Unit will communicate with bidders for, among others, where bid clarity is sought, to obtain information or to extend the validity period. Any communication either by facsimile, letter or electronic mail or any other form of correspondence to any official or representative of MGSLG in respect of this bid between the closing date and the award of the bid by the bidder is prohibited.

## 11. PROHIBITION OF RESTRICTIVE PRACTICES

- a. In terms of section 4(1) of the Competition Act No. 89 of 1998, as amended, an agreement between, or concerted practice by, firms, or a decision by an association of firms, is prohibited if it is between parties in a horizontal relationship and if a bidder(s) is (are) or a contractor(s) was/were involved in:
- Directly or indirectly fixing a purchase or selling price or any other trading condition
  - Dividing markets by allocating customers, suppliers, territories or specific types of goods or services; or
  - Collusive bidding.
- b. If a bidder(s) or contractor(s), in the judgement of the purchaser, has/have engaged in any of the restrictive practices referred to above, the purchaser may, without prejudice to any other remedy provided for, invalidate the bid(s) for such item(s) offered or terminate the contract in whole or in part and refer the matter to the Competition Commission for investigation and possible imposition of administrative penalties as contemplated in the Competition Act No. 89 of 1998.

## 12. FRONTING

- a. MGSLG, in compliance with regulations, supports the spirit of Broad Based Black Economic Empowerment and recognizes that real empowerment can only be achieved through individuals and businesses conducting themselves in accordance with the Constitution and in an honest, fair, equitable, transparent and legally compliant manner. Against this background the MGSLG condemns any form of fronting.
- b. MGSLG, in ensuring that bidders conduct themselves in an honest manner will, as part of the bid evaluation processes, conduct or initiate the necessary enquiries/investigations to determine that accuracy of the representation made in bid documents. Should any of the fronting indicators as contained in the Guidelines on Complex Structures and Transactions and Fronting, issued by the Department of Trade and Industry (DTI), be established during such enquiry/investigation, the onus will be on the bidder/contractor to prove that fronting does not exist. Failure to do so within 14 days from date of notification may invalidate the bid/contract and may also result in restriction of the bidder/contractor to conduct business with the public sector for a period not exceeding ten years, in addition to any other remedies MGSLG may have against the bidder/contractor concerned.
- c. The awarded bidder cannot sub-contract more than 25% of the total project value to the company that is non-compliant with B-BBEE companies.

### **13. COMPULSORY BRIEFING**

A compulsory briefing session will be held on **21 NOVEMBER 2023, 11H30** at the Vrededorp Campus of the Matthew Goniwe School of Leadership and Governance. This session will provide bidders an opportunity to clarify certain aspects of the process as set out in this document and to address any substantial issues they might have.

### **14. PRESENTATION**

MGSLG may require presentation/interviews from shortlisted bidders as part of the bid process.

### **15. TIMEFRAMES AND FORMAL CONTRACT**

Successful bidder(s) will be required to enter into formal contract with MGSLG.

### **16. PACKAGING OF BID**

The bidder shall place both the sealed Technical Proposal and Price/Financial Proposal envelopes into an outer sealed envelope or package, and must be clearly marked as follows;

### **17. FUNCTIONALITY/TECHNICAL PROPOSAL**

Bid No: MGSLG/202311/IA2P

Description: IMPACT ASSESSMENT FOR TWO SELECTED PROGRAMMES

Bid Closing date and Time: 28 NOVEMBER 2023, 11H00.

Name and Address of Bidder:.....

**In this envelope, the bidder shall only address the technical aspects of the bid.**

### **18. PRICE/FINANCIAL PROPOSAL**

Bid No: MGSLG/202311/IA2P

Description: IMPACT ASSESSMENT FOR TWO SELCETED PROGRAMMES

Bid Closing date and Time: 28 NOVEMBER 2023,11H00

Name and Address of Bidder:.....

In this envelope, the bidder shall only provide the price/financial proposal.

The Technical Proposal envelope and Financial Proposal envelope shall contain one original hard copy document, clearly marked "Original" and One (1) hard copies, clearly marked "Copy".

## 19. CONTACT DETAILS

MGSLG Supply Chain Management  
Private Bag X9,  
Melville, 2109

Postnet Suite 161,  
Melville, 2109  
Physical Address: 40 Hull Street, Vrededorp  
For general enquiries: [procurement@mgsi.co.za](mailto:procurement@mgsi.co.za)  
For technical enquiries:  
[procurement@mgsi.co.za](mailto:procurement@mgsi.co.za)

**The bidder is instructed to submit their proposals together with the following documents. Failure to submit complete documentation will render the bidder's proposal null and void.**

## 20. INVITATION TO BID

**YOU ARE HEREBY INVITED TO BID FOR  
IMPACT ASSESSMENT FOR TWO SELECTED PROGRAMMES**

**BID NUMBER: MGSLG/202311/IA2P CLOSING DATE: 28 NOVEMBER 2023**

**CLOSING TIME: 11:00**

**DESCRIPTION: IMPACT ASSESSMENT FOR TWO SELECTED PROGRAMMES**

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**The successful bidder will be required to fill in and sign a written Contract Form (SBD 7).**

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**BID DOCUMENTS MUST BE SUBMITTED DURING OFFICE HOURS INTO THE TENDER BOX.**

**Bidders should ensure that bids are delivered timeously to the correct address. If the bid is late, it will not be accepted for consideration.**

**ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS – (NOT TO BE RE-TYPED)**

**THE FOLLOWING PARTICULARS MUST BE FURNISHED**  
**(FAILURE TO DO SO MAY RESULT IN YOUR BID BEING DISQUALIFIED)**

NAME OF BIDDER.....

POSTAL ADDRESS.....

STREET ADDRESS.....

TELEPHONE NUMBER CODE.....NUMBER.....

**CELLPHONE NUMBER** .....

FACSIMILE NUMBER CODE ..... NUMBER.....

E-MAIL ADDRESS.....

VAT REGISTRATION NUMBER.....

HAS AN ORIGINAL AND VALID TAX CLEARANCE CERTIFICATE BEEN SUBMITTED? (SBD 2) YES or NO

HAS A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE BEEN SUBMITTED? (SBD 6.1) YES or NO IF

YES, WHO WAS THE CERTIFICATE ISSUED BY?

AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA).....  
.....

A VERIFICATION AGENCY ACCREDITED BY THE SOUTH AFRICAN ACCREDITATION SYSTEM (SANAS);  
OR.....

A REGISTERED AUDITOR .....  
[TICK APPLICABLE BOX]

**(A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE 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 or NO [IF YES ENCLOSE PROOF]

SIGNATURE OF BIDDER.....

DATE.....

CAPACITY UNDER WHICH THIS BID IS

SIGNED.....

TOTAL BID PRICE.....

---

**ANY ENQUIRIES REGARDING THE BIDDING PROCEDURE MAY BE DIRECTED TO:**

**Department:** Supply chain Management unit

**E-mail address:** [procurement@mgsi.co.za](mailto:procurement@mgsi.co.za)

**ANY ENQUIRIES REGARDING TECHNICAL INFORMATION MAY BE DIRECTED TO:**

**E-mail address:** [procurement@mgsi.co.za](mailto:procurement@mgsi.co.za)

## **21. TAX CLEARANCE CERTIFICATE REQUIREMENTS**

**It is a condition of bid that the taxes of the successful bidder must be in order, or that satisfactory arrangements have been made with South African Revenue Service (SARS) to meet the bidder's tax obligations.**

1. In order to meet this requirement bidders are required to complete in full the attached form TCC 001 "Application for a Tax Clearance Certificate" and submit it to any SARS branch office nationally. The Tax Clearance Certificate Requirements are also applicable to foreign bidders / individuals who wish to submit bids.
2. 2 SARS will then furnish the bidder with a Tax Clearance Certificate that will be valid for a period of 1 (one) year from the date of approval.
3. The original Tax Clearance Certificate must be submitted together with the bid. Failure to submit the original and valid Tax Clearance Certificate will result in the invalidation of the bid. Certified copies of the Tax Clearance Certificate will not be acceptable.
4. In bids where Consortia / Joint Ventures / Sub-contractors are involved, each party must submit a separate Tax Clearance Certificate.
5. Copies of the TCC 001 "Application for a Tax Clearance Certificate" form are available from any SARS branch office nationally or on the website [www.sars.gov.za](http://www.sars.gov.za).
6. Applications for the Tax Clearance Certificates may also be made via eFiling. In order to use this provision, taxpayers will need to register with SARS as eFilers through the website [www.sars.gov.za](http://www.sars.gov.za).

**22. PRICING SCHEDULE – FIRM PRICES**

**(PURCHASES)**

**NOTE: ONLY FIRM PRICES WILL BE ACCEPTED. NON-FIRM PRICES (INCLUDING PRICES SUBJECT TO RATES OF EXCHANGE VARIATIONS) WILL NOT BE CONSIDERED**

**IN CASES WHERE DIFFERENT DELIVERY POINTS INFLUENCE THE PRICING, A SEPARATE PRICING SCHEDULE MUST BE SUBMITTED FOR EACH DELIVERY POINT**

Name of bidder.....	Bid number.....
Closing Time 11:00	Closing date.....

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

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

**FROM OF OFFER**

**Please provide bid price below in figures and in words:**

**BID PRICE IN FIGURES R.....**

**BID PRICE IN WORDS**

.....

.....

.....

The bidder must attached separate price breakdown schedule that demonstrate each line item that makes up the grand total above

- Does the offer comply with the specification(s)? \*YES/NO
- If not to specification, indicate deviation(s) .....
- Period required for delivery .....

Note: All delivery costs must be included in the bid price, for delivery at the prescribed destination.  
 \*\* "all applicable taxes" includes value- added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies.

\*Delete if not applicable

## 23. DECLARATION OF INTEREST

1. Any legal person, including persons employed by the state<sup>1</sup>, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes a price quotation, advertised competitive bid, limited bid or proposal). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where-

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

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

- 2.1 Full Name of bidder or his or her representative: .....
- 2.2 Identity Number: .....
- 2.3 Position occupied in the Company (director, trustee, shareholder<sup>2</sup>): .....
- 2.4 Company Registration Number: .....
- 2.5 Tax Reference Number: .....
- 2.6 VAT Registration Number: .....

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

<sup>1</sup>"State" means –

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

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

- 2.7 Are you or any person connected with the bidder **YES / NO**  
presently employed by the state?

- 2.7.1 If so, furnish the following particulars:

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

Name of state institution at which you or the person

connected to the bidder is employed : .....  
Position occupied in the state institution: .....

Any other particulars:  
.....  
.....  
.....

2.7.2 If you are presently employed by the state, did you obtain the appropriate authority to undertake remunerative work outside employment in the public sector? **YES / NO**

2.7.2.1 If yes, did you attached proof of such authority to the bid document? **YES / NO**

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

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

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

2.8 Did you or your spouse, or any of the company's directors / trustees / shareholders / members or their spouses conduct business with the state in the previous twelve months? **YES / NO**

2.8.1 If so, furnish particulars:  
.....  
.....  
.....

2.9 Do you, or any person connected with the bidder, have any relationship (family, friend, other) with a person employed by the state and who may be involved with the evaluation and or adjudication of this bid? **YES / NO**

2.9.1 If so, furnish particulars.  
.....  
.....  
.....

2.10 Are you, or any person connected with the bidder, **YES/NO**  
aware of any relationship (family, friend, other) between any other bidder and any person employed by the state

who may be involved with the evaluation and or adjudication of this bid?

2.10.1 If so, furnish particulars.

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

2.11 Do you or any of the directors / trustees / shareholders / members **YES/NO**  
of the company have any interest in any other related  
companies whether or not they are bidding for this  
contract?

2.11.1 If so, furnish particulars:

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

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

Full Name	Identity Number	Personal Tax Reference Number	State Number / Employee Peral Number

**DECLARATION**

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

CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 2 and 3 ABOVE IS CORRECT.  
I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 23  
OF THE GENERAL CONDITIONS OF CONTRACT SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....  
Signature

.....  
Date

.....  
Position

.....  
Name of bidder

## 24. PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2011, AS PREVAILING AT THE TIME OF THE BID

This preference form must form part of all bids invited. It contains general information and serves as a claim form for preference points for Broad-Based Black Economic Empowerment (B-BBEE) Status Level of Contribution

**NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF B-BBEE, AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS, 2011, AS PREVAILING AT THE TIME OF THE BID.**

### 1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to all bids:

- the 80/20 system for requirements with a Rand value of up to R1 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000.00 (all applicable taxes included).

1.2 The value of this bid is estimated to exceed/not exceed R50 000 000.00 (all applicable taxes included) and therefore the.....system shall be applicable.

1.3 Preference points for this bid shall be awarded for: (a)

- Price; and
- (b) B-BBEE Status Level of Contribution.

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

### POINTS

1.3.1.1 **PRICE** .....

1.3.1.2 **B-BBEE STATUS LEVEL OF CONTRIBUTION** .....

**Total points for Price and B-BBEE must not exceed 100**

1.4 Failure on the part of a bidder to fill in and/or to sign this form and submit a B-BBEE Verification Certificate from a Verification Agency accredited by the South African Accreditation System (SANAS) or a Registered Auditor approved by the Independent Regulatory Board of Auditors (IRBA) or an Accounting Officer as contemplated in the Close Corporation Act (CCA) together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.

1.5 The purchaser reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the purchaser.

### 2. DEFINITIONS

2.1 **“all applicable taxes”** includes value-added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies;

- 2.2 **“B-BBEE”** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- 2.3 **“B-BBEE status level of contributor”** means the B-BBEE status received by a measured entity based on its overall performance using the relevant scorecard contained in the Codes of Good Practice on Black Economic Empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- 2.4 **“bid”** means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of services, works or goods, through price quotations, advertised competitive bidding processes or proposals;
- 2.5 **“Broad-Based Black Economic Empowerment Act”** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- 2.6 **“comparative price”** means the price after the factors of a non-firm price and all unconditional discounts that can be utilized have been taken into consideration;
- 2.7 **“consortium or joint venture”** means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract;
- 2.8 **“contract”** means the agreement that results from the acceptance of a bid by an organ of state;
- 2.9 **“EME”** means any enterprise with an annual total revenue of R5 million or less .
- 2.10 **“Firm price”** means the price that is only subject to adjustments in accordance with the actual increase or decrease resulting from the change, imposition, or abolition of customs or excise duty and any other duty, levy, or tax, which, in terms of the law or regulation, is binding on the contractor and demonstrably has an influence on the price of any supplies, or the rendering costs of any service, for the execution of the contract;
- 2.11 **“functionality”** means the measurement according to predetermined norms, as set out in the bid documents, of a service or commodity that is designed to be practical and useful, working or operating, taking into account, among other factors, the quality, reliability, viability and durability of a service and the technical capacity and ability of a bidder;
- 2.12 **“non-firm prices”** means all prices other than “firm” prices;
- 2.13 **“person”** includes a juristic person;
- 2.14 **“rand value”** means the total estimated value of a contract in South African currency, calculated at the time of bid invitations, and includes all applicable taxes and excise duties;
- 2.15 **“sub-contract”** means the primary contractor’s assigning, leasing, making out work to, or employing, another person to support such primary contractor in the execution of part of a project in terms of the contract;
- 2.16 **“total revenue”** bears the same meaning assigned to this expression in the Codes of Good Practice on Black Economic Empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act and promulgated in the *Government Gazette* on 9 February 2007;
- 2.17 **“trust”** means the arrangement through which the property of one person is made over or bequeathed to a trustee to administer such property for the benefit of another person; and
- 2.18 **“trustee”** means any person, including the founder of a trust, to whom property is bequeathed in order for such property to be administered for the benefit of another person.

### **3. ADJUDICATION USING A POINT SYSTEM**

- 3.1 The bidder obtaining the highest number of total points will be awarded the contract.

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

**4. POINTS AWARDED FOR PRICE**

**4.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS**

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

$$P_s = 80 - \frac{P_t - P_{min}}{P_t - P_{min}} \quad \text{or} \quad P_s = 90 - \frac{P_t - P_{min}}{P_t - P_{min}}$$

Where

- $P_s$  = Points scored for comparative price of bid under consideration
- $P_t$  = Comparative price of bid under consideration
- $P_{min}$  = Comparative price of lowest acceptable bid

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

5.1 In terms of Regulation 5 (2) and 6 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

<b>B-BBEE Status Level of Contributor</b>	<b>Number of points (90/10 system)</b>	<b>Number of points (80/20 system)</b>
1	10	20
2	9	18
3	8	16
4	5	12
5	4	8
6	3	6
7	2	4
8	1	2
Non-compliant contributor	0	0

- 5.2 Bidders who qualify as EMEs in terms of the B-BBEE Act must submit a certificate issued by an Accounting Officer as contemplated in the CCA or a Verification Agency accredited by SANAS or a Registered Auditor. Registered auditors do not need to meet the prerequisite for IRBA's approval for the purpose of conducting verification and issuing EMEs with B-BBEE Status Level Certificates.
- 5.3 Bidders other than EMEs must submit their original and valid B-BBEE status level verification certificate or a certified copy thereof, substantiating their B-BBEE rating issued by a Registered Auditor approved by IRBA or a Verification Agency accredited by SANAS.
- 5.4 A trust, consortium or joint venture, will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their B-BBEE status level certificate.
- 5.5 A trust, consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.
- 5.6 Tertiary institutions and public entities will be required to submit their B-BBEE status level certificates in terms of the specialized scorecard contained in the B-BBEE Codes of Good Practice.
- 5.7 A person will not be awarded points for B-BBEE status level if it is indicated in the bid documents that such a bidder intends sub-contracting more than 25% of the value of the contract to any other enterprise that does not qualify for at least the points that such a bidder qualifies for, unless the intended sub-contractor is an EME that has the capability and ability to execute the sub-contract.
- 5.8 A person awarded a contract may not sub-contract more than 25% of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level than the person concerned, unless the contract is sub-contracted to an EME that has the capability and ability to execute sub-contract.

**6. BID DECLARATION**

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

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

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

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

**8 SUB-CONTRACTING**

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

8.1.1 If yes, indicate:

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

**9 DECLARATION WITH REGARD TO COMPANY/FIRM**

9.1 Name of company/firm ..... :

9.2 VAT registration number : .....

9.3 Company registration number .....

9.4 TYPE OF COMPANY/ FIRM

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

[TICK APPLICABLE BOX]

9.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

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

9.6 COMPANY CLASSIFICATION

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

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

9.8 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBEE status level of contribution indicated in paragraph 7 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I / we acknowledge that:

- (i) The information furnished is true and correct;
- (ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form.
- (iii) In the event of a contract being awarded as a result of points claimed as shown in paragraph 7, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;
- (iv) If the B-BBEE status level of contribution has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –
  - (a) disqualify the person from the bidding process;
  - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
  - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
  - (d) restrict the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, from obtaining business from any organ of state for a period not exceeding 10 years, after the audi alteram partem (hear the other side) rule has been applied; and
  - (e) forward the matter for criminal prosecution

**WITNESSES:**

1. ....

2. ....

.....

**SIGNATURE(S) OF BIDDER(S)**

DATE:.....

ADDRESS:.....

.....

.....

## 25. DECLARATION CERTIFICATE FOR LOCAL PRODUCTION AND CONTENT FOR DESIGNATED SECTORS

This Standard Bidding Document (SBD) must form part of all bids invited. It contains general information and serves as a declaration form for local content (local production and local content are used interchangeably).

Before completing this declaration, bidders must study the General Conditions, Definitions, Directives applicable in respect of Local Content as prescribed in the Preferential Procurement Regulations, 2011, the South African Bureau of Standards (SABS) approved technical specification number SATS 1286:2011 (Edition 1) and the Guidance on the Calculation of Local Content together with the Local Content Declaration Templates [Annex C (Local Content Declaration: Summary Schedule), D (Imported Content Declaration: Supporting Schedule to Annex C) and E (Local Content Declaration: Supporting Schedule to Annex C)].

### 1. General Conditions

- 1.1. Preferential Procurement Regulations, 2011 (Regulation 9) makes provision for the promotion of local production and content.
- 1.2. Regulation 9.(1) prescribes that in the case of designated sectors, where in the award of bids local production and content is of critical importance, such bids must be advertised with the specific bidding condition that only locally produced goods, services or works or locally manufactured goods, with a stipulated minimum threshold for local production and content will be considered.
- 1.3. Where necessary, for bids referred to in paragraph 1.2 above, a two stage bidding process may be followed, where the first stage involves a minimum threshold for local production and content and the second stage price and B-BBEE.
- 1.4. A person awarded a contract in relation to a designated sector, may not sub-contract in such a manner that the local production and content of the overall value of the contract is reduced to below the stipulated minimum threshold.
- 1.5. The local content (LC) expressed as a percentage of the bid price must be calculated in accordance with the SABS approved technical specification number SATS 1286: 2011 as follows:

$$LC = [1 - x / y] * 100$$

Where

x is the imported content in Rand

y is the bid price in Rand excluding value added tax (VAT)

Prices referred to in the determination of x must be converted to Rand (ZAR) by using the exchange rate published by South African Reserve Bank (SARB) at 12:00 on the date of advertisement of the bid as indicated in paragraph 4.1 below.

**The SABS approved technical specification number SATS 1286:2011 is accessible on [http://www.thedti.gov.za/industrial development/ip.jsp](http://www.thedti.gov.za/industrial%20development/ip.jsp) at no cost.**

1.6 A bid may be disqualified if –

- (a) this Declaration Certificate and the Annex C (Local Content Declaration: Summary Schedule) are not submitted as part of the bid documentation; and
- (b) the bidder fails to declare that the Local Content Declaration Templates (Annex C, D and E) have been audited and certified as correct.

**2. Definitions**

- 2.1. **“bid”** includes written price quotations, advertised competitive bids or proposals;
- 2.2. **“bid price”** price offered by the bidder, excluding value added tax (VAT);
- 2.3. **“contract”** means the agreement that results from the acceptance of a bid by an organ of state;
- 2.4. **“designated sector”** means a sector, sub-sector or industry that has been designated by the Department of Trade and Industry in line with national development and industrial policies for local production, where only locally produced services, works or goods or locally manufactured goods meet the stipulated minimum threshold for local production and content;
- 2.5. **“duly sign”** means a Declaration Certificate for Local Content that has been signed by the Chief Financial Officer or other legally responsible person nominated in writing by the Chief Executive, or senior member / person with management responsibility(close corporation, partnership or individual).
- 2.6. **“imported content”** means that portion of the bid price represented by the cost of components, parts or materials which have been or are still to be imported (whether by the supplier or its subcontractors) and which costs are inclusive of the costs abroad (this includes labour or intellectual property costs), plus freight and other direct importation costs, such as landing costs, dock duties, import duty, sales duty or other similar tax or duty at the South African port of entry;
- 2.7. **“local content”** means that portion of the bid price which is not included in the imported content, provided that local manufacture does take place;
- 2.8. **“stipulated minimum threshold”** means that portion of local production and content as determined by the Department of Trade and Industry; and
- 2.9. **“sub-contract”** means the primary contractor’s assigning, leasing, making out work to, or employing another person to support such primary contractor in the execution of part of a project in terms of the contract.

**3. The stipulated minimum threshold(s) for local production and content (refer to Annex A of SATS 1286:2011) for this bid is/are as follows:**

<u>Description of services, works or goods</u>	<u>Stipulated minimum threshold</u>
_____	_____ %
_____	_____ %
_____	_____ %

4. Does any portion of the services, works or goods offered have any imported content?

(Tick applicable box)

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
-----	--------------------------	----	--------------------------

4.1 If yes, the rate(s) of exchange to be used in this bid to calculate the local content as prescribed in paragraph 1.5 of the general conditions must be the rate(s) published by SARB for the specific currency at 12:00 on the date of advertisement of the bid.

The relevant rates of exchange information is accessible on [www.reservebank.co.za](http://www.reservebank.co.za).

Indicate the rate(s) of exchange against the appropriate currency in the table below (refer to Annex A of SATS 1286:2011):

Currency	Rates of exchange
US Dollar	
Pound Sterling	
Euro	
Yen	
Other	

NB: Bidders must submit proof of the SARB rate (s) of exchange used.

5. Were the Local Content Declaration Templates (Annex C, D and E) audited and certified as correct?

(Tick applicable box)

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
-----	--------------------------	----	--------------------------

5.1. If yes, provide the following particulars:

- (a) Full name of auditor:.....
- (b) Practice number: .....
- (c) Telephone and cell number:.....
- (d) Email address: .....

(Documentary proof regarding the declaration will, when required, be submitted to the satisfaction of the Accounting Officer / Accounting Authority)

6. Where, after the award of a bid, challenges are experienced in meeting the stipulated minimum threshold for local content the DTI must be informed accordingly in order for the DTI to verify and in consultation with the AO/AA provide directives in this regard.

**LOCAL CONTENT DECLARATION (REFER TO ANNEX B OF SATS 1286:2011)**

**LOCAL CONTENT DECLARATION BY CHIEF FINANCIAL OFFICER OR OTHER LEGALLY RESPONSIBLE PERSON NOMINATED IN WRITING BY THE CHIEF EXECUTIVE OR SENIOR MEMBER/PERSON WITH MANAGEMENT RESPONSIBILITY (CLOSE CORPORATION, PARTNERSHIP OR INDIVIDUAL)**

**IN RESPECT OF BID NO.** .....

**ISSUED BY:** (Procurement Authority / Name of Institution):  
..... NB

1 The obligation to complete, duly sign and submit this declaration cannot be transferred to an external authorized representative, auditor or any other third party acting on behalf of the bidder.

2 Guidance on the Calculation of Local Content together with Local Content Declaration Templates (Annex C, D and E) is accessible on [http://www.thdti.gov.za/industrial\\_development/ip.jsp](http://www.thdti.gov.za/industrial_development/ip.jsp). Bidders should first complete Declaration D. After completing Declaration D, bidders should complete Declaration E and then consolidate the information on Declaration C. **Declaration C should be submitted with the bid documentation at the closing date and time of the bid in order to substantiate the declaration made in paragraph (c) below.** Declarations D and E should be kept by the bidders for verification purposes for a period of at least 5 years. The successful bidder is required to continuously update Declarations C, D and E with the actual values for the duration of the contract.

I, the undersigned, ..... (full names), do hereby declare, in my capacity as ..... of .....(name of bidder entity), the following:

(a) The facts contained herein are within my own personal knowledge. (b) I

have satisfied myself that:

- (i) the goods/services/works to be delivered in terms of the above-specified bid comply with the minimum local content requirements as specified in the bid, and as measured in terms of SATS 1286:2011; and
- (ii) the declaration templates have been audited and certified to be correct.

(c) The local content percentage (%) indicated below has been calculated using the formula given in clause 3 of SATS 1286:2011, the rates of exchange indicated in paragraph 4.1 above and the information contained in Declaration D and E which has been consolidated in Declaration C:

Bid price, excluding VAT (y)	R
Imported content (x), as calculated in terms of SATS 1286:2011	R
Stipulated minimum threshold for local content (paragraph 3 above)	
Local content %, as calculated in terms of SATS 1286:2011	

If the bid is for more than one product, the local content percentages for each product contained in Declaration C shall be used instead of the table above.

The local content percentages for each product has been calculated using the formula given in clause 3 of SATS 1286:2011, the rates of exchange indicated in paragraph 4.1 above and the information contained in Declaration D and E.

(d) I accept that the Procurement Authority / Institution has the right to request that the local content be verified in terms of the requirements of SATS 1286:2011.

(e) I understand that the awarding of the bid is dependent on the accuracy of the information furnished in this application. I also understand that the submission of incorrect data, or data that are not verifiable as described in SATS 1286:2011, may result in the Procurement Authority / Institution imposing any or all of the remedies as provided for in Regulation 13 of the Preferential Procurement Regulations, 2011 promulgated under the Preferential Policy Framework Act (PPFA), 2000 (Act No. 5 of 2000).

**SIGNATURE:** \_\_\_\_\_

**DATE:** \_\_\_\_\_

**WITNESS No. 1** \_\_\_\_\_

**DATE:** \_\_\_\_\_

**WITNESS No. 2** \_\_\_\_\_

**DATE:** \_\_\_\_\_

## 26. 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)
  - (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	.....

**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.

<i>DESCRIPTION OF SERVICE</i>	PRICE (ALL APPLICABLE TAXES INCLUDED)	COMPLETION DATE	B-BBEE STATUS 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: .....

## 27. 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	<p>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?</p> <p>(Companies or persons who are listed on this Database were informed in writing of this restriction by the Accounting Officer/Authority of the institution that imposed the restriction after the <i>audi alteram partem</i> rule was applied).</p> <p><b>The Database of Restricted Suppliers now resides on the National Treasury's website(<a href="http://www.treasury.gov.za">www.treasury.gov.za</a>) and can be accessed by clicking on its link at the bottom of the home page.</b></p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
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)? <b>The Register for Tender Defaulters can be accessed on the National Treasury's website (<a href="http://www.treasury.gov.za">www.treasury.gov.za</a>) by clicking on its link at the bottom of the home page.</b>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
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 <input type="checkbox"/>	No <input type="checkbox"/>
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 <input type="checkbox"/>	No <input type="checkbox"/>
4.4.1	If so, furnish particulars:		

**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**

## 28. CERTIFICATE OF INDEPENDENT BID DETERMINATION

- 1 This Standard Bidding Document (SBD) must form part of all bids<sup>1</sup> 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).<sup>2</sup>  
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:

<sup>1</sup> Includes price quotations, advertised competitive bids, limited bids and proposals.

<sup>2</sup> 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.

29. **CERTIFICATE OF INDEPENDENT BID DETERMINATION**

I, the undersigned, in submitting the accompanying bid:

**BID No. MGLG/202311/IA2P**

**IMPACT ASSESSMENT FOR TWO SELECTED PROGRAMMES**

in response to the invitation for the bid made by:

**MATTHEW GONIWE SCHOOL OF LEADERSHIP AND GOVERNANCE**

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<sup>3</sup> will not be construed as collusive bidding.
7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:

- (a) prices;
- (b) geographical area where product or service will be rendered (market allocation) (c) methods, factors or formulas used to calculate prices;
- (d) the intention or decision to submit or not to submit, a bid;
- (e) the submission of a bid which does not meet the specifications and conditions of the bid;  
or
- (f) bidding with the intention not to win the bid.

8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.

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

10. 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

<sup>3</sup> 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.

30.

**TENDER REFERENCE REQUEST FORM**

Please may we request that this reference is completed and returned electronically to [procurement@mgsl.co.za](mailto:procurement@mgsl.co.za), please return by latest, 28 NOVEMBER 2023 at 11:00.

<p>Tender Name : MGSLG/202311/IA2P</p> <p>IMPACT ASSESSMENT FOR TWO SELECTED PROGRAMMES</p>
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Reference in respect of (name of the company the reference is being provided for):

**Details of the person completing the reference:**

**NAME** : \_\_\_\_\_

**JOB TITLE** : \_\_\_\_\_

**COMPANY** : \_\_\_\_\_

**TELEPHONE NUMBER** : \_\_\_\_\_

**EMAIL ADDRESS** : \_\_\_\_\_

Please provide a description of services/products/works successfully delivered /completed by this organisation for your business. Please note, this is *for information only*.

Date period	Value (R)	Description of services/products/works delivered/provided

## Reference Questions

Please answer all of the following questions using the scoring method detailed below:

- 4 = Excellent
- 3 = Good
- 2 = Satisfactory
- 0 = Unsatisfactory

Question No	Question	Satisfaction Score
1	How do you rate the quality of the services delivered by this organisation?	
2	How well does/did this organisation manage the delivery of the services?	
3	For those involved in the delivery of services, how do you rate the organisation's staff in terms of competency and experience?	
4	How well does/did the organisation work in partnership with you and other stakeholders?	
5	How well the organisation does/did communicate with and involve service users and/or customers? (Did they provide regular updates over the course of the project)	
6	How effective and timely are/were they at responding to requests for information?	
7	How well do you consider the organisation met/meets the needs of your service users and/or customers? (Did they understand your business as a the client)	
8	How well does/did the organisation deliver the services to the agreed timescales?	
9	How well does/did the organisation deliver the services within the agreed budget?	
10	Would you recommend this organisation as a supplier to other organisations/businesses?	

**Date:**

**Signature:**

**Company Stamp**