BA-PHALABORWA MUNICIPALITY

PANEL OF CONSULTING SERVICE PROVIDERS FOR BUILT ENVIRONMENT, SOCIO-ECONOMIC, PROJECT MANAGEMENT AND TRANSACTIONAL ADVISORY SERVICES FOR A PERIOD OF THREE (3) YEARS

TENDER NUMBER: BPM 13/26/27

Closing Date: 06/11/2026

Time: 11h00

Venue: Tender Box (Main Office)

Tender Documents are available from the municipal website and the E-tender portal.

Ba-Phalaborwa Municipality Budget and Treasury Office: Contact: Selepe NW Manager: Supply Chain Tel: (015) 780 6300	**Ba-Phalaborwa Municipality** Budget and Treasury : Contact: Choeu M Manager: Planning and Development Tel: (015) 780 6300

Name of Tenderer: ……

Type of Service to be Rendered: ……

Category Tendered For ……

TENDER NO: BPM 13/26/27

1. <u>Tender Notice and Invitation to bid</u>

BA- PHALABORWA MUNICIPALITY

Ba-Phalaborwa Municipality hereby invites suitable professional services providers to render service), for the below listed project in the Ba-Phalaborwa Municipality of the Mopani District in Limpopo Province.

Tender documents are obtainable from the municipal website and E-tender portal.
Below are the significant details per project:-

TENDER NUMBER	CIDB GRADING	DESCRIPTION	COMPULSORY BRIEFING SESSION			FUNCTIONALITY	EVALUATION CRITERIA	CLOSING DATE AND TIME	Minimum Score for functionality	CONTACT PERSON
			DATE	VENUE	COST					
BPM 13/26/27	N/A	Panel of consulting service providers for Built environment. Socio-economic, Project Management and transactional advisory services for a period of three (3) years	23/10/2026 @11H00	Municipal Activity Hall	Free at municipal website and E-tender portal	**Company Experience (50) Experience of key personnel (50)**	80/20	06/11/2026 @11H00	70%	Choeu M (015) 780 6300

A compulsory briefing session will be held on the dates and times specified above at Activity Hall, Ba-Phalaborwa Municipality Main Office, CNR Mandela and Sealene Street.
The bids are to be deposited in the tender box of Ba-Phalaborwa Municipality Offices situated at CNR Mandela Drive & Sealene Street in Phalaborwa, by the closing date and time as above mentioned, where they are open in public. No late, telefaxed or Document found in any other place or proposal from service providers who have not attended the compulsory briefing session will not be considered.
Bidders should take note of the following bidding conditions:

1. Ba-Phalaborwa Municipality Supply Chain Management Policy shall apply in the evaluation and awarding of the Tender.
2. Ba-Phalaborwa Municipality does not bind itself to accept the lowest tender, reserves the right to accept the whole or part of the Tender and reserves the right not to appoint.
3. The Bid validity shall be 90 (Ninety) days from the date of closure.
4. Bidders must provide proof of the following to avoid disqualification: CSD report not older than 3 months, SAPS certified ID Copies of all directors, statement of municipal rates and taxes for both company and director (s) (not older than 3 months)/letter from traditional authority not older than 3 months/ lease agreement, key personnel/service team's experience (attach certified copies of qualifications and CV; CK/Company registration, Valid tax pin, proof of work experience (attach relevant appointment letter).**All the relevant returnable documents are attached to the tender document,**
5. The minimum score for functionality will be as stated above and bidders who score below will not be evaluated further on price and specific goals specified for the tender.

Ms. MOKOBI ST
MUNICIPAL MANAGER
Notice No. 08/26

SCOPE OF WORK

1. Background and Legislative Compliance

1.1. Legislative Framework
1.2. Regulatory Currency Clause
1.3. Purpose of the Tender
1.4. Panel Duration
1.5. Utilization of the Panel
1.6. Scope of the Panel
1.7. Project Types
1.8. No Guarantee of Work
1.9. Performance and Compliance

2. Areas of Expertise

2.1. Discipline Selection and Separate Submissions
2.2. List of disciplines

3. Functionality and Evaluation Criteria

3.1. Quality Criteria Overview
3.2. Functionality Assessment
3.3. Discipline-Specific Functionality
3.4. Key Personnel and Professional Registration
3.5. Personnel Consent and Availability
3.6. Company/Bidder Experience
3.7. Minimum Functionality Threshold

4. VERIFICATION, AUTHENTICITY AND ANTI-DUPLICATION

5. PRICING AND PREFERENTIAL PROCUREMENT FOR INDIVIDUAL ASSIGNMENT

6. DISCIPLINE-SPECIFIC FUNCTIONALITY SCHEDULES

6.1. Town Planning
6.2. Urban Design
6.3. Land Surveying
6.4. Architecture
6.5. Environmental Management
6.6. Geology / Geotechnical Services
6.7. Economics
6.8. Statistics
6.9. Media and Marketing
6.10. Tourism and Event Organizing
6.11. Social Facilitation and Mediation
6.12. Transactional Advisory
6.13. Project Management

1. BACKGROUND AND LEGISLATIVE COMPLIANCE

1.1. LEGISLATIVE AND REGULATORY FRAMEWORK

1.1.1. Constitution of the Republic of South Africa, 1996, particularly section 217 and all other applicable constitutional requirements.
1.1.2. Local Government: Municipal Finance Management Act, 2003 (Act 56 of 2003) (MFMA).
1.1.3. Municipal Supply Chain Management Regulations, 2005, including amendments applicable at the date of the procurement.
1.1.4. Ba-Phalaborwa Local Municipality's approved Supply Chain Management Policy and related SCM procedures.
1.1.5. Preferential Procurement Policy Framework Act, 2000 (Act 5 of 2000), and Preferential Procurement Regulations, 2022, to the extent applicable and in force.
1.1.6. Applicable National Treasury MFMA Circulars, SCM instructions, guidelines and standard bidding documentation.
1.1.7. Public Procurement Act, 2024 (Act 28 of 2024), and regulations/amendments only to the extent that the relevant provisions have commenced and apply to municipalities at the time of the procurement.
1.1.8. Planning Profession Act, 2002 (Act 36 of 2002), where planning work is performed.
1.1.9. Geomatics Profession Act, 2013 (Act 19 of 2013), where geomatics/land surveying work is performed.
1.1.10. Architectural Profession Act, 2000 (Act 44 of 2000), where architectural work is performed.
1.1.11. Natural Scientific Professions Act, 2003 (Act 27 of 2003), where natural scientific work is performed.
1.1.12. National Environmental Management Act, 1998 (Act 107 of 1998), including the environmental assessment practitioner registration framework where applicable.
1.1.13. Project and Construction Management Professions Act, 2000 (Act 48 of 2000), where project/construction management services fall within the regulated scope.
1.1.14. All other national, provincial and municipal legislation, by-laws, standards, policies and professional rules applicable to the assignment.

1.2. REGULATORY CURRENCY CLAUSE

Where legislation, regulations, professional registration requirements, National Treasury instructions, municipal policy or delegated authority requirements are amended, replaced or brought into operation after publication of this specification but before an assignment is issued, the Municipality shall apply the legally operative framework applicable to that procurement stage, subject to the tender conditions and advice from the Municipality's SCM and legal functions.

1.3. PURPOSE OF THE TENDER

a) The purpose of this tender is to establish a panel of suitably qualified and experienced professional consulting service providers to provide specialized professional services to the Ba-Phalaborwa Local Municipality, as and when such services are required, over a period of three (3) years.

b) Admission to the panel will be based on the bidder's demonstrated functionality**,** as evaluated in accordance with the functionality criteria, weighting and minimum qualifying threshold specified in this tender.

c) No pricing will be evaluated for purposes of establishing the panel.

d) Appointment to the panel shall constitute eligibility for consideration for future assignments and shall not constitute an award of any specific project, a guarantee of work, a minimum volume of work or an obligation on the Municipality to procure services from any panel member.

e) The panel is intended to provide the Municipality with access to appropriately qualified professional expertise across the identified disciplines within the Built Environment, Socio-Economic Development, Project Management and Transactional Advisory fields.

f) The establishment of the panel is intended to:

i. provides the Municipality with access to suitably qualified and experienced professional service providers;

ii. support the planning, development, implementation and management of municipal projects and programmes;

iii. improve the Municipality's ability to obtain specialized technical, professional and advisory services when required;

iv. facilitate efficient and compliant procurement of professional services in accordance with the Municipality's approved Supply Chain Management Policy and applicable legislation;

v. provide access to multidisciplinary expertise where required by the nature and complexity of a particular assignment; and

vi. support the Municipality in achieving its service delivery, infrastructure development, socio-economic development and institutional objectives.

1.4. DURATION OF THE PANEL

a) The panel shall be established for a period of three (3) years commencing from the date determined by the Municipality in the appointment documentation.

b) The Municipality may utilize the panel throughout the approved panel period, subject to:

i. the availability of an approved budget;
ii. the Municipality's operational and project requirements;

iii. compliance with the applicable Supply Chain Management Policy and legislation;
iv. the continued eligibility and professional compliance of the panel member; and
v. the applicable procurement process for each individual assignment.

c) The expiry of the panel period shall not, by itself, terminate an assignment or contract that was lawfully awarded to a panel member before the expiry of the panel, provided that such assignment is managed in accordance with the applicable contractual and SCM requirement.

1.5. UTILIZATION OF THE PANEL

a) The panel shall be utilized by the Municipality on an as-and-when-required basis for professional services falling within the disciplines for which service providers have been appointed.

b) Appointment to the panel shall not confer any automatic right or entitlement to work.

c) Where the Municipality requires professional services, it shall identify the applicable discipline, scope of work, deliverables, required professional expertise, estimated value and applicable procurement process.

d) The Municipality may, where required by the applicable legislative and SCM framework, conduct a second-stage call-off/competitive procurement process among eligible panel members within the relevant discipline.

e) At the call-off stage, the Municipality may require panel members to submit, as applicable:

i. a technical proposal or methodology;

ii. a project-specific work programme;

iii. professional team composition;

iv. availability and capacity confirmation;

v. a fee proposal or quotation; and

vi. any other information reasonably required for the specific assignment.

f) The scope of work, deliverables, programme, professional team requirements and pricing/remuneration for each specific assignment shall be determined at the call-off stage.

g) Pricing shall therefore be obtained and evaluated, where applicable, as part of the procurement process for the specific assignment and not as part of the establishment of the panel.

h) The Municipality shall apply the procurement method and evaluation criteria applicable to the specific assignment, in accordance with its approved Supply Chain Management Policy, available budget, applicable legislation and the conditions applicable to that procurement.

i) Where a multidisciplinary assignment is required, the Municipality may procure the required disciplines in accordance with the applicable SCM process and may require coordination between the appointed professional service providers.

j) The Municipality shall not be obliged to allocate work equally among panel members. Any allocation, rotation, competitive process or other mechanism used to select panel members for specific assignments shall be implemented in accordance with the Municipality's approved SCM framework and the applicable procurement process.

1.6. SCOPE OF THE PANEL

a) The panel shall comprise professional service providers with demonstrated expertise in the following broad fields:

Field	Discipline / Area of Expertise
Built Environment	Town Planning
	Urban Design
	Land Surveying
	Architecture
	Environmental Management
	Geology / Geotechnical Services
Socio-Economic Development	Economics
	Statistics
	Media and Marketing
	Tourism and Event Organising
	Social Facilitation and Mediation
Project Management and Transactional Advisory	Transactional Advisory
	Project Management

b) The scope of services under each discipline is further detailed in the Discipline-Specific Functionality and Evaluation Schedules contained in this tender document.
c) The Municipality may require services that comprise one discipline or, depending on the nature and complexity of the assignment, a combination of disciplines.

d) The successful panel member shall only perform services within the scope for which it has been appointed and shall ensure that all regulated professional services are performed by appropriately qualified and professionally registered practitioners where required by law.

1.7. PROJECT TYPES

a) The panel may be utilized for a broad range of municipal projects, programmes, studies and professional assignments falling within the appointed disciplines. These may include, but are not limited to:

i. municipal infrastructure and development projects;
ii. spatial planning, land-use and development planning initiatives;
iii. urban development, precinct planning and urban regeneration projects;
iv. municipal buildings and architectural projects;
v. land surveying, geospatial and related technical assignments;
vi. environmental assessments, environmental management and compliance-related assignments;
vii. geological and geotechnical investigations;
viii. socio-economic research, development planning and economic studies;
ix. local economic development and tourism-related initiatives;
x. statistical research, surveys, data analysis, monitoring and evaluation;
xi. stakeholder engagement, social facilitation and mediation;
xii. communication, marketing, media and public information programmes;
xiii. tourism programmes and events;
xiv. project and programme management;
xv. feasibility studies and business cases;
xvi. transactional and financial/economic advisory assignments;
xvii. strategic, implementation and development planning studies; and
xviii. any other professional assignment reasonably falling within the appointed discipline and the Municipality's mandate.

b) The above project types are indicative and do not constitute a guarantee that any project or service will be awarded to a panel member.

1.8. NO GUARANTEE OF WORK

a) Appointment to the panel shall *not constitute a guarantee, commitment or undertaking by the Municipality to procure any minimum quantity, volume, frequency or monetary value of services from any panel member.
b) The Municipality shall determine its professional service requirements based on its operational needs, approved budgets, project readiness, funding availability, legislative requirements and applicable procurement processes.

c) A panel member shall therefore make no claim against the Municipality for loss of income, anticipated profit, opportunity cost or any other loss arising solely from:

i. not receiving an assignment;
ii. receiving fewer assignments than anticipated;
iii. receiving assignments of a lower value than anticipated; or
iv. the Municipality electing not to utilize the panel for a particular requirement.

d) No panel member may commence work on behalf of the Municipality without a lawful appointment, purchase order, contract or other authorized instruction issued in accordance with the Municipality's applicable SCM and financial control requirements.

1.9. PERFORMANCE AND COMPLIANCE

a) All panel members shall be required to maintain the standards of professional competence, ethical conduct, capacity and statutory compliance demonstrated during the tender process throughout the duration of the panel.

b) Panel members shall:

i. perform all services professionally, diligently and in accordance with the agreed scope, specifications, deliverables and applicable professional standards;
ii. comply with all applicable legislation, regulations, municipal policies, professional rules, standards and codes of conduct;
iii. maintain all professional registrations, licenses, permits and statutory authorizations required for the services being performed;
iv. ensure that proposed key personnel remain available and appropriately qualified for assignments allocated to the panel member;
v. comply with agreed project programmes, milestones and reporting requirements;
vi. maintain appropriate quality assurance and document-control systems;
vii. promptly disclose any actual, potential or perceived conflict of interest;
viii. protect confidential municipal and project information and comply with applicable information and data-protection requirements;
ix. maintain adequate records and supporting documentation relating to all assignments;
x. comply with the Municipality's contract management, invoicing, payment and variation-control requirements; and
xi. cooperate with the Municipality's monitoring, verification, audit and performance-management processes.

c) The Municipality may monitor the performance of panel members through project deliverables, quality assessments, adherence to agreed programmes, professional compliance, responsiveness, reporting and other objective performance indicators.

d) Where a panel member fails to meet its contractual, professional or statutory obligations, the Municipality may take appropriate action in accordance with the applicable contract, Conditions of Tender, Supply Chain Management Policy and legislation. Such action may include corrective measures, suspension from further utilization, termination of an assignment or removal from the panel, where legally and contractually permissible.

2. AREAS OF EXPERTISE

2.1. DISCIPLINE SELECTION AND SEPARATE SUBMISSIONS

a) A bidder may select and submit a bid for **only one (1) discipline per tender submission/document.**

b) A bidder that wishes to apply for more than one discipline may submit a separate tender submission/document for each additional discipline, provided that the bidder satisfies all the mandatory requirements and functionality criteria applicable to each respective discipline.

c) Each submission shall be evaluated independently against the requirements and discipline-specific functionality criteria applicable to the discipline selected in that submission.

d) A bidder shall clearly indicate the discipline for which the submission is made.

e) Where a bidder submits a single tender document in respect of two or more disciplines, the submission shall be regarded as non-responsive, and the bidder shall be disqualified from further evaluation in respect of that submission.

f) Where a bidder submits separate submissions for different disciplines, each submission shall contain all documentation and supporting evidence required for the discipline. The bidder shall not assume that documentation submitted under one discipline automatically satisfies the requirements of another discipline.

g) Where the same key personnel are proposed in separate submissions for different disciplines, the bidder shall ensure that the personnel are appropriately qualified, professionally registered where applicable, and available to perform the respective roles. The requirements relating to personnel consent and duplication set out elsewhere in this tender shall apply.

2.2. LIST OF DISCIPLINES

The Municipality intends to establish a panel of professional consulting service providers in the following fields and disciplines:

Field	**Discipline**	**X** *(*select *only one (1) discipline)*
Built Environment	Town Planning	
	Urban Design	
	Land Surveying	
	Architecture	
	Environmental Management	

	Geology / Geotechnical Services	
Socio-Economic Development	Economics	
	Statistics	
	Media and Marketing	
	Tourism and Event Organizing	
	Social Facilitation and Mediation	
Project Management and Transactional Advisory	Transactional Advisory	
	Project Management	

a) The scope of services, minimum qualifications, professional registration requirements, key personnel requirements, experience requirements and functionality criteria applicable to each discipline are set out in the Discipline-Specific Functionality and Evaluation Schedules contained in this tender document.

b) The Municipality reserves the right to appoint an appropriate number of service providers per discipline, subject to the evaluation outcomes, the requirements of the tender, available capacity within the market and the Municipality's approved procurement requirements.

c) Appointment to a particular discipline shall not authorize a panel member to provide professional services falling outside the discipline for which the panel member has been appointed, unless such services are subsequently procured through a lawful procurement process and the service provider meets all applicable requirements.

3. FUNCTIONALITY AND EVALUATION CRITERIA

3.1. QUALITY CRITERIA OVERVIEW

a) The functionality evaluation shall assess the bidder’s demonstrated technical competence, relevant experience, professional expertise, and qualifications and experience of the proposed key personnel in relation to the specific discipline for which the bidder has submitted its tender.

b) Each discipline included in this tender has its own discipline-specific functionality criteria, taking into consideration the nature, complexity, professional requirements and technical competencies applicable to that discipline.

c) The bidder shall be evaluated only against the functionality criteria applicable to the discipline selected in its tender submission.

d) The functionality assessment shall be conducted on a total of **100 points,** as follows:

Functionality Area	Maximum Points
Company / Bidder Relevant Experience	50
Key Personnel – Qualifications, Professional Registration and Experience	50
TOTAL	**100**

e) The minimum qualifying functionality score is **80/100**.

f) Only bidders that achieve the minimum functionality threshold and comply with all applicable mandatory requirements shall proceed for further consideration in accordance with the applicable Conditions of Tender and procurement process.

3.2. FUNCTIONALITY ASSESSMENT

a) The functionality assessment shall be undertaken separately for each discipline for which a bidder has submitted a tender.

b) The Evaluation Committee shall evaluate each bidder against the criteria, sub-criteria and weightings prescribed in the relevant Discipline-Specific Functionality Evaluation Schedule.

c) The Evaluation Committee shall not introduce or apply criteria, requirements or weightings that are not contained in this tender document.

d) The functionality score shall be determined as follows:

Functionality Criterion	Points
Company / Bidder Relevant Experience	50
Key Personnel – Qualifications, Professional Registration and Experience	50
TOTAL	**100**

A bidder must obtain at least **80 points** to qualify for further consideration for appointments to the panel in the relevant discipline.

3.3. DISCIPLINE-SPECIFIC FUNCTIONALITY

a) The Municipality has developed separate functionality criteria for each discipline included in the panel.

b) The discipline-specific evaluation schedules set out the requirements relating to:

i. company/bidder experience;
ii. relevant completed projects;
iii. minimum qualifications of key personnel;
iv. applicable professional registration;
v. relevant experience of key personnel;
vi. supporting technical personnel;
vii. documentary evidence required to substantiate the information submitted.

c) Each discipline shall be evaluated independently against its respective functionality schedule.

d) The functionality requirements for one discipline shall not automatically be applied to another discipline.

e) Where a bidder submits separate tender submissions for different disciplines, each submission shall be evaluated independently, and the bidder must satisfy the functionality requirements applicable to each respective discipline.

3.4. KEY PERSONNEL AND PROFESSIONAL REGISTRATION

a) The bidder shall identify the key personnel proposed to provide the professional services for the discipline for which the bidder has submitted its tender.

b) The minimum qualifications, experience and professional registration requirements applicable to key personnel are specified in the relevant discipline-specific functionality schedule.

c) Where legislation requires professional service to be performed by, or under the professional responsibility of, a person registered with a statutory professional council or regulatory body, the proposed professional must possess the appropriate and valid registration applicable to the services to be performed.
d) Such statutory professional registration shall be regarded as a mandatory professional requirement where applicable and shall not be substituted by membership of a voluntary professional association.

e) Where no statutory professional registration applies to a particular discipline, the Municipality shall assess the proposed personnel based on their:
i. relevant academic qualifications;
ii. professional and technical experience;
iii. demonstrated competence;
iv. relevant project experience; and
v. membership of recognized professional or industry bodies, where applicable.

f) The Municipality reserves the right to verify all qualifications, professional registrations, experience and other credentials submitted by the bidder.

3.5. PERSONNEL CONSENT AND AVAILABILITY

a) Each proposed key person whose qualifications, experience or CV is submitted for purposes of functionality evaluation shall provide a signed consent and availability declaration confirming that:

i. the person has consented to being proposed as part of the bidder's professional team;
ii. the person has authorized the bidder to submit their CV, qualifications and professional registration details for evaluation purposes;
iii. the information submitted in respect of the person is accurate and may be verified by the Municipality;
iv. the person understands the role for which they have been proposed; and
v. the person will be available to perform the proposed role if the bidder is appointed to the panel and subsequently awarded an assignment requiring their services.

3.6. COMPANY / BIDDER EXPERIENCE

a) The bidder's experience shall be evaluated based on relevant completed assignments that are substantially similar to the discipline for which the bidder has submitted its tender.

b) The experience claimed must demonstrate the bidder's ability to provide the required professional services and must relate to the nature and scope of the discipline applied for.

c) The bidder shall provide the documentary evidence prescribed in the relevant discipline-specific functionality schedule, which may include:

i. appointment or award letters;
ii. completion certificates; and
iii. client reference letters or confirmations

d) Only experience supported by sufficient documentary evidence shall be considered for scoring.

e) Experience shall be assessed based on its relevance, similarity, complexity and scope of services, and not merely on the number of projects submitted.

f) Where a bidder claims experience obtained as part of a joint venture, consortium or other permitted association, the bidder must clearly identify its role and contribution to the project. Such experience shall only be considered where it is permissible under the Conditions of Tender.

3.7. MINIMUM FUNCTIONALITY THRESHOLD

a) The total functionality score shall be 100 points.

b) A bidder must obtain a minimum of 80 points out of 100 in the functionality evaluation applicable to the discipline for which the bidder has submitted its tender.

c) A bidder that obtains less than 80 points shall be regarded as having failed the functionality requirement and shall not qualify for further consideration for appointment to the panel in that discipline.

d) The functionality threshold shall be applied consistently to all bidders submitting tenders for the same discipline.

e) Achievement of the minimum functionality threshold does not, in itself, constitute an award or appointment to the panel. Final appointment shall remain subject to the applicable procurement process, evaluation outcomes, approval requirements and the Conditions of Tender.

4. VERIFICATION AND ANTI-DUPLICATION

1.1. The Municipality reserves the right to verify qualifications, professional registrations, employment/association, project references, appointment letters, completion certificates and other evidence directly with the issuing institution or client.

1.2. A bidder must not claim another entity's experience as its own except where the tender conditions expressly permit experience of a JV/consortium member and the legal/contractual structure supports the claim.

1.3. All personnel must give written consent to being included in the bid and must be available for the assignment if appointed.

1.4. Material misrepresentation, forged documentation, false references, undisclosed duplication or deliberate misstatement may result in disqualification and/or further action permitted by law and the SCM Policy.

5. PRICING AND PREFERENTIAL PROCUREMENT FOR INDIVIDUAL ASSIGNMENTS

5.1 PANEL ESTABLISHMENT

a) The establishment of the panel shall be based on the functionality criteria and minimum qualifying threshold specified in this tender.

b) No pricing shall be evaluated for purposes of establishing the panel.

c) Appointment to the panel shall not constitute an award of any specific assignment or guarantee of work.

5.2 PRICING FOR INDIVIDUAL ASSIGNMENTS

a) Pricing or professional fees for individual assignments shall be obtained and evaluated at the call-off stage, where applicable, in accordance with the Municipality's approved Supply Chain Management Policy, applicable legislation and the procurement process applicable to the specific assignment.

b) The Municipality shall determine the scope of work, deliverables, programme, required professional expertise and applicable pricing/fee requirements for each individual assignment.

c) Panel members may be required to submit a fee proposal or quotation as part of the applicable call-off process.

5.3 PREFERENCE POINT SYSTEM

a) The applicable preference point system shall be determined and applied in accordance with the applicable procurement legislation and regulations, the Municipality's approved Supply Chain Management Policy and Preferential Procurement Policy, and the Conditions of Tender.

b) Where applicable, the applicable preference point system for an individual assignment shall be determined in accordance with the procurement requirements applicable to that assignment at the time of procurement.

c) Specific goals shall be evaluated in accordance with the applicable legislation, regulations, Municipal policies and the requirements stipulated for the relevant individual assignment.

6. DISCIPLINE-SPECIFIC FUNCTIONALITY SCHEDULES

6.1. TOWN PLANNING

6.1.1. MANDATORY TOWN PLANNING PROFESSIONAL REQUIREMENTS

a) A bidder submitting for Town Planning must:

i. Be a SACPLAN-registered practice/consultancy and provide valid proof.
ii. Nominate a Professional Planner with a relevant Degree/BTech and valid SACPLAN registration.
iii. Nominate a Technical Planner with a relevant Diploma and valid SACPLAN registration.

iv. Submit for each key person: qualification, SACPLAN registration proof, CV and signed consent/availability declaration.

b) Failure to meet these mandatory professional requirements will render the bid non-responsive and it will not proceed to functionality evaluation.

6.1.2. FUNCTIONALITY EVALUATION

ITEM No.	FUNCTIONALITY CRITERIA	BID RATING	WEIGHTING
1	**COMPANY / BIDDER EXPERIENCE**		**50**
1.1	**Previous experience in Town Planning / related planning assignments** Bidder must submit appointment letters, completion certificates and signed and verifiable client reference letters for the projects claimed.	**20 or more relevant completed Town Planning/planning assignments** – 50 points	**50**
		15–19 relevant completed assignments – 40 points	
		10–14 relevant completed assignments – 30 points	
		5–9 relevant completed assignments – 20 points	
		2–4 relevant completed assignments – 10 points	
		Fewer than 2 relevant completed assignments or insufficient/unverifiable evidence – 0 points	
2	**KEY PERSONNEL**		**50**
2.1	**Company Director** Bidder must submit a certified Degree in Town Planning, Urban and Regional Planning or equivalent recognized planning degree, certified valid SACPLAN professional registration certificate, detailed CV and a personnel consent/availability declaration duly signed by the nominated person and commissioned by a Commissioner of Oaths.	**10 or more years relevant Town Planning experience** – 20 points	**20**
		7–9 years relevant Town Planning experience – 15 points	
		4–6 years relevant Town Planning experience – 10 points	
		1–3 years relevant Town Planning experience – 5 points	
		No relevant experience or insufficient evidence – 0 points	
2.2	**Professional Planner** Bidder must submit a certified Degree/BTech in Town Planning, Urban and Regional Planning or equivalent recognized planning qualification, certified valid SACPLAN professional registration certificate, detailed CV and a personnel consent/availability declaration duly signed by the nominated person and commissioned by a Commissioner of Oaths.	**10 or more years relevant Town Planning experience** – 15 points	**15**
		7–9 years relevant Town Planning experience – 12 points	
		4–6 years relevant Town Planning experience – 9 points	
		1–3 years relevant Town Planning experience – 5 points	

		No relevant experience or insufficient evidence – 0 points	
2.3	**Technical Planner** Bidder must submit a certified Diploma in Town Planning, Urban and Regional Planning or equivalent recognized planning qualification, certified valid SACPLAN technical planner registration certificate, detailed CV and personnel consent/availability declaration duly signed by the nominated person and commissioned by a Commissioner of Oaths.	**7 or more years relevant technical planning experience** – 15 points	**15**
		5–6 years relevant technical planning experience – 10 points	
		3–4 years relevant technical planning experience – 7 points	
		1–2 years relevant technical planning experience – 3 points	
		No relevant experience or insufficient evidence – 0 points	
TOTAL			**100**
MINIMUM QUALIFYING SCORE		**80%**	**80/100**

6.2. URBAN DESIGN

6.2.1. MANDATORY URBAN DESIGN PROFESSIONAL REQUIREMENTS

a) A bidder submitting for Urban Design must:

i. Nominate a Professional Urban Designer with a relevant NQF Level 8 or higher qualification in Urban Design with valid professional registration with SACPLAN, SACAP or another applicable statutory professional council.
ii. Submit for the nominated key professional: certified qualification, certified valid professional registration certificate, detailed CV and personnel consent/availability declaration duly signed by the nominated person and commissioned by a Commissioner of Oaths.
iii. Provide UDISA professional membership as supporting evidence of specialist Urban Design competence. UDISA's current professional membership framework recognizes applicants with accredited Urban Design qualifications or approved portfolios who hold professional registration with SACAP, SACPLAN, SACLAP or a similar body.

b) Failure to meet the applicable mandatory professional requirements will render the bid non-responsive and it will not proceed with functionality evaluation.

6.2.2. FUNCTIONALITY EVALUATION

ITEM No.	FUNCTIONALITY CRITERIA	BID RATING	WEIGHTING
1	**COMPANY / BIDDER EXPERIENCE**		**50**

1.1	**Previous experience in Urban Design / related urban design assignments** Bidder must submit appointment letters, completion certificates and signed and verifiable client reference letters for the projects claimed.	10 or more relevant completed Urban Design assignments **– 50 points**	**50**
		8–9 relevant completed assignments **– 40 points**	
		6–7 relevant completed assignments **– 30 points**	
		4–5 relevant completed assignments **– 20 points**	
		2–3 relevant completed assignments **– 10 points**	
		Fewer than 2 relevant completed assignments or insufficient/unverifiable evidence **– 0 points**	
2	**KEY PERSONNEL**		**50**
2.1	**Company Director** Bidder must submit a certified relevant Degree in Urban Design or equivalent recognized qualification, certified valid professional registration certificate with the applicable statutory professional council, detailed CV and a personnel consent/availability declaration duly signed by the nominated person and commissioned by a Commissioner of Oaths.	10 or more years relevant Urban Design experience **– 20 points**	**20**
		7–9 years relevant Urban Design experience **– 15 points**	
		4–6 years relevant Urban Design experience **– 10 points**	
		1–3 years relevant Urban Design experience **– 5 points**	
		No relevant experience or insufficient evidence **– 0 points**	
2.2	**Professional Urban Designer** Bidder must submit a certified relevant Degree/BTech in Urban Design or equivalent recognized qualification, certified valid professional registration certificate with the applicable statutory professional council, detailed CV and a personnel consent/availability declaration duly signed by the nominated person and commissioned by a Commissioner of Oaths.	10 or more years relevant Urban Design experience **– 15 points**	**15**
		7–9 years relevant Urban Design experience **– 12 points**	
		4–6 years relevant Urban Design experience **– 9 points**	
		1–3 years relevant Urban Design experience **– 5 points**	

		No relevant experience or insufficient evidence **– 0 points**	
2.3	**Urban Design Support Professional / Design Technician** Bidder must submit a certified relevant qualification in Urban Design, Architecture, Town Planning, Landscape Architecture or related built-environment discipline, detailed CV and a personnel consent/availability declaration duly signed by the nominated person and commissioned by a Commissioner of Oaths.	7 or more years relevant Urban Design experience **– 15 points**	**15**
		5–6 years relevant Urban Design experience **– 10 points**	
		3–4 years relevant Urban Design experience **– 7 points**	
		1–2 years relevant Urban Design experience **– 3 points**	
		No relevant experience or insufficient evidence **– 0 points**	
TOTAL			**100**
MINIMUM QUALIFYING SCORE		**80%**	**80/100**

6.3. LAND SURVEYING

6.3.1. MANDATORY LAND SURVEYING PROFESSIONAL REQUIREMENTS

a) A bidder submitting for Land Surveying must:

i. Nominate a Professional Land Surveyor with a relevant recognized qualification and valid registration with the South African Geomatics Council (SAGC).
ii. Nominate a Professional Land Surveying Technologist/Technician with a relevant recognized qualification and valid SAGC registration.
iii. Submit for each key person: qualification, valid SAGC registration certificate, detailed CV and signed consent/availability declaration.

b) Failure to meet these mandatory professional requirements will render the bid non-responsive and it will not proceed to functionality evaluation**.**

6.3.2. FUNCTIONALITY EVALUATION

ITEM No.	FUNCTIONALITY CRITERIA	BID RATING	WEIGHTING
1	**COMPANY / BIDDER EXPERIENCE**		**50**
1.1	**Previous experience in Land Surveying / related surveying assignments** Bidder must submit appointment letters, completion certificates and signed and verifiable client reference letters for the projects claimed.	15 or more relevant completed Land Surveying assignments – **50 points**	**50**
		12–14 relevant completed assignments – **40 points**	
		9–11 relevant completed assignments – **30 points**	
		5–8 relevant completed assignments – **20 points**	
		2–4 relevant completed assignments – **10 points**	
		Fewer than 2 relevant completed assignments or insufficient/unverifiable evidence – **0 points**	
2	**KEY PERSONNEL**		**50**
2.1	**Company Director** Bidder must submit a certified relevant Degree in Land Surveying, Geomatics or equivalent recognized qualification, certified valid SAGC professional registration certificate, detailed CV and a personnel consent/availability declaration duly signed by the nominated person and commissioned by a Commissioner of Oaths.	10 or more years relevant Land Surveying experience – **20 points**	**20**
		7–9 years relevant Land Surveying experience – **15 points**	
		4–6 years relevant Land Surveying experience – **10 points**	
		1–3 years relevant Land Surveying experience – **5 points**	
		No relevant experience or insufficient evidence – **0 points**	
2.2	**Professional Land Surveyor** Bidder must submit a certified relevant Degree in Land Surveying, Geomatics or equivalent recognized qualification, certified valid SAGC professional registration certificate, detailed CV and a personnel consent/availability declaration duly signed by the nominated person and commissioned by a Commissioner of Oaths.	10 or more years relevant Land Surveying experience – **15 points**	**15**
		7–9 years relevant Land Surveying experience – **12 points**	
		4–6 years relevant Land Surveying experience – **9 points**	

		1–3 years relevant Land Surveying experience – **5 points**	
		No relevant experience or insufficient evidence – **0 points**	
2.3	**Professional Land Surveying Technologist / Technician** Bidder must submit a certified relevant Diploma/Degree in Land Surveying, Geomatics or equivalent recognized qualification, certified valid SAGC registration certificate, detailed CV and a personnel consent/availability declaration duly signed by the nominated person and commissioned by a Commissioner of Oaths.	7 or more years relevant Land Surveying experience – **15 points**	**15**
		5–6 years relevant Land Surveying experience – **10 points**	
		3–4 years relevant Land Surveying experience – **7 points**	
		1–2 years relevant Land Surveying experience – **3 points**	
		No relevant experience or insufficient evidence – **0 points**	
TOTAL			**100**
MINIMUM QUALIFYING SCORE		**80%**	**80/100**

6.4. ARCHITECTURE

6.4.1. MANDATORY ARCHITECTURAL PROFESSIONAL REQUIREMENTS

a) A bidder submitting for Architecture must:

i. Nominate a Professional Architect with a recognized architectural qualification and valid SACAP professional registration.
ii. Nominate a Professional Senior Architectural Technologist or Professional Architectural Technologist with a relevant recognized architectural qualification and valid SACAP professional registration.
iii. Submit for each key person: certified qualification, certified valid SACAP registration certificate, detailed CV and a personnel consent/availability declaration duly signed by the nominated person and commissioned by a Commissioner of Oaths.

b) Failure to meet these mandatory professional requirements will render the bid non-responsive and it will not proceed to functionality evaluation.

6.4.2. FUNCTIONALITY EVALUATION

ITEM No.	FUNCTIONALITY CRITERIA	BID RATING	WEIGHTING
1	**COMPANY / BIDDER EXPERIENCE**		**50**
1.1	**Previous experience in Architecture / related architectural assignments** Bidder must submit appointment letters, completion certificates and signed and verifiable client reference letters for the projects claimed.	10 or more relevant completed Architectural assignments – **50 points**	**50**
		8–9 relevant completed assignments – **40 points**	
		6–7 relevant completed assignments – **30 points**	
		4–5 relevant completed assignments – **20 points**	
		2–3 relevant completed assignments – **10 points**	
		Fewer than 2 relevant completed assignments or insufficient/unverifiable evidence – **0 points**	
2	**KEY PERSONNEL**		**50**
2.1	**Company Director** Bidder must submit a certified recognized Degree in Architecture, equivalent recognized architectural qualification, certified valid SACAP professional registration certificate, detailed CV and a personnel consent/availability declaration duly signed by the nominated person and commissioned by a Commissioner of Oaths.	10 or more years relevant architectural experience – **20 points**	**20**
		7–9 years relevant architectural experience – **15 points**	
		4–6 years relevant architectural experience – **10 points**	
		1–3 years relevant architectural experience – **5 points**	
		No relevant experience or insufficient evidence – **0 points**	
2.2	**Professional Architect** Bidder must submit a certified recognized Degree in Architecture or equivalent recognized architectural qualification, certified valid SACAP professional registration certificate, detailed CV and a personnel consent/availability declaration duly signed by the nominated person and commissioned by a Commissioner of Oaths.	10 or more years relevant architectural experience – **15 points**	**15**
		7–9 years relevant architectural experience – **12 points**	
		4–6 years relevant architectural experience – **9 points**	
		1–3 years relevant architectural experience – **5 points**	
		No relevant experience or insufficient evidence – **0 points**	

2.3	**Professional Senior Architectural Technologist / Professional Architectural Technologist** Bidder must submit a certified recognized architectural qualification, certified valid SACAP professional registration certificate and applicable Certificate of Competence where required, detailed CV and a personnel consent/availability declaration duly signed by the nominated person and commissioned by a Commissioner of Oaths.	7 or more years relevant architectural experience – **15 points**	**15**
		5–6 years relevant architectural experience – **10 points**	
		3–4 years relevant architectural experience – **7 points**	
		1–2 years relevant architectural experience – **3 points**	
		No relevant experience or insufficient evidence – **0 points**	
TOTAL			**100**
MINIMUM QUALIFYING SCORE		**80%**	**80/100**

6.5. ENVIRONMENTAL MANAGEMENT

6.5.1. MANDATORY ENVIRONMENTAL MANAGEMENT PROFESSIONAL REQUIREMENTS

a) A bidder submitting for Environmental Management must:

i. Nominate a Registered Environmental Assessment Practitioner (EAP) where the scope of services requires an EAP in terms of applicable NEMA legislation and regulations, with valid EAPASA registration.
ii. Nominate an appropriately qualified environmental professional with relevant Environmental Management, Environmental Science, Natural Science or equivalent recognized qualification. For specialist scientific services, nominate appropriately qualified professionals registered with the South African Council for Natural Scientific Professions (SACNASP).
iii. Submit for each key person: certified qualification, valid professional registration proof where applicable, detailed CV and a personnel consent/availability declaration duly signed by the nominated person and commissioned by a Commissioner of Oaths.

b) Failure to meet the applicable mandatory professional and regulatory requirements will render the bid non-responsive and it will not proceed to functionality evaluation.

6.5.2. FUNCTIONALITY EVALUATION

ITEM No.	FUNCTIONALITY CRITERIA	BID RATING	WEIGHTING
1	**COMPANY / BIDDER EXPERIENCE**		**50**
1.1	**Previous experience in Environmental Management / Environmental Assessment assignments** Bidder must submit appointment letters, completion certificates and signed and verifiable client reference letters for the projects claimed.	15 or more relevant completed Environmental Management/Environmental Assessment assignments – **50 points**	**50**
		12–14 relevant completed assignments – **40 points**	
		9–11 relevant completed assignments – **30 points**	
		5–8 relevant completed assignments – **20 points**	
		2–4 relevant completed assignments – **10 points**	
		Fewer than 2 relevant completed assignments or insufficient/unverifiable evidence – **0 points**	
2	**KEY PERSONNEL**		**50**
2.1	**Company Director** Bidder must submit a certified relevant Degree in Environmental Management, Environmental Science, Natural Science or equivalent recognized qualification, certified valid professional registration where applicable, detailed CV and a personnel consent/availability declaration duly signed by the nominated person and commissioned by a Commissioner of Oaths.	10 or more years relevant Environmental Management experience – **20 points**	**20**
		7–9 years relevant experience – **15 points**	
		4–6 years relevant experience – **10 points**	
		1–3 years relevant experience – **5 points**	
		No relevant experience or insufficient evidence – **0 points**	
2.2	**Environmental Assessment Practitioner / Environmental Management Specialist** Bidder must submit a certified relevant environmental qualification, valid EAPASA registration, detailed CV and a personnel consent/availability declaration duly signed by the nominated person and commissioned by a Commissioner of Oaths.	10 or more years relevant Environmental Management/Assessment experience – **15 points**	**15**
		7–9 years relevant experience – **12 points**	
		4–6 years relevant experience – **9 points**	
		1–3 years relevant experience – **5 points**	

		No relevant experience or insufficient evidence – **0 points**	
2.3	**Natural Scientist** Bidder must submit a certified relevant qualification in Environmental Science, Natural Science, Ecology, related field, valid SACNASP registration, detailed CV and a personnel consent/availability declaration duly signed by the nominated person and commissioned by a Commissioner of Oaths.	7 or more years relevant Environmental Management experience – **15 points**	**15**
		5–6 years relevant experience – **10 points**	
		3–4 years relevant experience – **7 points**	
		1–2 years relevant experience – **3 points**	
		No relevant experience or insufficient evidence – **0 points**	
TOTAL			**100**
MINIMUM QUALIFYING SCORE		**80%**	**80/100**

6.6. GEOLOGY / GEOTECHNICAL SERVICES

6.6.1. MANDATORY GEOLOGY / GEOTECHNICAL PROFESSIONAL REQUIREMENTS

a) A bidder submitting for Geology / Geotechnical Services must:

i. Nominate a Professional Geotechnical Engineer / Professional Engineering Technologist where the services constitute engineering work, with valid registration with the Engineering Council of South Africa (ECSA), and/or a Professional Natural Scientist / Engineering Geologist / Geologist where the services constitute geological or natural scientific work, with valid registration with the South African Council for Natural Scientific Professions (SACNASP), as applicable to the scope of services.
ii. Submit for each key person: certified qualification, certified valid professional registration certificate, detailed CV and a personnel consent/availability declaration duly signed by the nominated person and commissioned by a Commissioner of Oaths.

b) Failure to meet the applicable mandatory professional and regulatory requirements will render the bid non-responsive and it will not proceed to functionality evaluation.

6.6.2. FUNCTIONALITY EVALUATION

ITEM No.	FUNCTIONALITY CRITERIA	BID RATING	WEIGHTING
1	**COMPANY / BIDDER EXPERIENCE**		**50**
1.1	**Previous experience in Geology / Geotechnical Services** Bidder must submit appointment letters, completion certificates and signed and verifiable client reference letters for the projects claimed.	15 or more relevant completed Geology/Geotechnical assignments – **50 points**	**50**
		12–14 relevant completed assignments – **40 points**	
		9–11 relevant completed assignments – **30 points**	
		5–8 relevant completed assignments – **20 points**	
		2–4 relevant completed assignments – **10 points**	
		Fewer than 2 relevant completed assignments or insufficient/unverifiable evidence – **0 points**	
2	**KEY PERSONNEL**		**50**
2.1	**Company Director** Bidder must submit a certified relevant Degree in Civil Engineering, Geotechnical Engineering, Engineering Geology, Geology or equivalent recognized qualification, certified valid ECSA and/or SACNASP professional registration, detailed CV and a personnel consent/availability declaration duly signed by the nominated person and commissioned by a Commissioner of Oaths.	10 or more years relevant Geology/Geotechnical experience – **20 points**	**20**
		7–9 years relevant experience – **15 points**	
		4–6 years relevant experience – **10 points**	
		1–3 years relevant experience – **5 points**	
		No relevant experience or insufficient evidence – **0 points**	
2.2	**Professional Geotechnical Engineer / Engineering Geologist** Bidder must submit a certified relevant Degree in Civil/Geotechnical Engineering, Engineering Geology, Geology or equivalent recognized qualification, certified valid ECSA and/or SACNASP professional registration, detailed CV and a personnel consent/availability declaration duly signed by the nominated person and commissioned by a Commissioner of Oaths.	10 or more years relevant Geotechnical/Engineering Geology experience – **15 points**	**15**
		7–9 years relevant experience – **12 points**	
		4–6 years relevant experience – **9 points**	
		1–3 years relevant experience – **5 points**	

		No relevant experience or insufficient evidence – **0 points**	
2.3	**Geotechnical / Geological Technician or Technologist** Bidder must submit a certified relevant Diploma/Degree in Geotechnical Engineering, Civil Engineering, Geology, Engineering Geology or related field, valid professional registration where applicable, detailed CV and a personnel consent/availability declaration duly signed by the nominated person and commissioned by a Commissioner of Oaths.	7 or more years relevant Geotechnical/Geological experience – **15 points**	**15**
		5–6 years relevant experience – **10 points**	
		3–4 years relevant experience – **7 points**	
		1–2 years relevant experience – **3 points**	
		No relevant experience or insufficient evidence – **0 points**	
TOTAL			**100**
MINIMUM QUALIFYING SCORE		**80%**	**80/100**

6.7. ECONOMICS

6.7.1. MANDATORY ECONOMICS PROFESSIONAL REQUIREMENTS

a) A bidder submitting for Economics must:

i. Nominate a Lead Economist / Development Economist with a recognized bachelor's degree in Economics, Development Economics, Econometrics or equivalent relevant economics qualification.
ii. Nominate an Economist / Economic Development Specialist with a recognized qualification in Economics, Development Economics, Econometrics or equivalent relevant field.
iii. Demonstrate that the nominated professionals have relevant experience in economic research and analysis, local/regional economic development, economic development strategies, feasibility studies, socio-economic assessments, economic impact assessments and/or related economic advisory services.
iv. Submit for each key person: certified qualification, detailed CV and a personnel consent/availability declaration duly signed by the nominated person and commissioned by a Commissioner of Oaths.

b) Failure to meet these mandatory professional requirements will render the bid non-responsive and it will not proceed to functionality evaluation.

6.7.2. FUNCTIONALITY EVALUATION

ITEM No.	FUNCTIONALITY CRITERIA	BID RATING	WEIGHTING
1	**COMPANY / BIDDER EXPERIENCE**		**50**
1.1	**Previous experience in Economics / Economic Development and related assignments** Bidder must submit appointment letters, completion certificates and signed and verifiable client reference letters for the projects claimed.	10 or more relevant completed Economics/Economic Development assignments – **50 points**	**50**
		8–9 relevant completed assignments **– 40 points**	
		6–7 relevant completed assignments **– 30 points**	
		4–5 relevant completed assignments **– 20 points**	
		2–3 relevant completed assignments **– 10 points**	
		Fewer than 2 relevant completed assignments or insufficient/unverifiable evidence **– 0 points**	
2	**KEY PERSONNEL**		**50**
2.1	**Company Director** Bidder must submit a certified bachelor's degree or higher qualification in Economics, Development Economics, Econometrics or equivalent recognized economics qualification, detailed CV and a personnel consent/availability declaration duly signed by the nominated person and commissioned by a Commissioner of Oaths.	10 or more years relevant Economics/Economic Development experience – **20 points**	**20**
		7–9 years relevant experience **– 15 points**	
		4–6 years relevant experience **– 10 points**	
		1–3 years relevant experience **– 5 points**	
		No relevant experience or insufficient evidence **– 0 points**	
2.2	**Economist / Development Economist** Bidder must submit a certified bachelor's degree or higher qualification in Economics, Development Economics, Econometrics or equivalent recognized economics qualification, detailed CV and a personnel consent/availability declaration duly signed	10 or more years relevant Economics/Economic Development experience – **15 points**	**15**
		7–9 years relevant experience **– 12 points**	
		4–6 years relevant experience **– 9 points**	

	by the nominated person and commissioned by a Commissioner of Oaths.	1–3 years relevant experience **– 5 points**	
		No relevant experience or insufficient evidence **– 0 points**	
2.3	**Economic Development / Socio-Economic Analyst** Bidder must submit a certified relevant bachelor's degree or equivalent recognized qualification in Economics, Development Economics, Econometrics or a closely related economic field, detailed CV and a personnel consent/availability declaration duly signed by the nominated person and commissioned by a Commissioner of Oaths.	7 or more years relevant economic analysis/development experience **– 15 points**	**15**
		5–6 years relevant experience **– 10 points**	
		3–4 years relevant experience **– 7 points**	
		1–2 years relevant experience **– 3 points**	
		No relevant experience or insufficient evidence **– 0 points**	
TOTAL			**100**
MINIMUM QUALIFYING SCORE		**80%**	**80/100**

6.8. STATISTICS

6.8.1. MANDATORY STATISTICS PROFESSIONAL REQUIREMENTS

a) The bidder submitting for Statistics must:

i. Nominate a Lead / Principal Statistician with a master's degree or higher majoring in Statistics, Mathematical Statistics, Applied Statistics, Statistical Sciences or an equivalent relevant statistical field**,** with a minimum of 10 years' relevant professional experience in statistical consulting and services, including sampling, weighting, survey design, statistical modelling and data analysis**.**

ii. Nominate a Senior Statistician / Statistical Methodologist with a relevant Honours Degree, master's degree or equivalent recognized qualification in Statistics, Mathematical Statistics, Applied Statistics, Statistical Sciences or a related field.

iii. Nominate a Statistician / Statistical Analyst with a relevant bachelor's degree or higher qualification in Statistics, Mathematical Statistics, Applied Statistics, Statistical Sciences or a related field.

iv. Where the services constitute professional natural scientific practice, the Lead / Principal Statistician must hold valid registration with the South African Council for Natural Scientific Professions (SACNASP) in the applicable field of practice, including Statistical Science, where applicable.

v. For each nominated key personnel, the bidder must submit certified copy of the relevant academic qualification; certified copy of valid professional registration certificate, where applicable; detailed and current CV demonstrating relevant

experience; and Personnel consent and availability declaration duly signed by the nominated person and commissioned by a Commissioner of Oaths**.**

b) Failure to meet the mandatory professional requirements shall render the bid non-responsive and the bidder shall not proceed to functionality evaluation.

6.8.2. FUNCTIONALITY EVALUATION

ITEM No.	FUNCTIONALITY CRITERIA	BID RATING	WEIGHTING
1	**COMPANY / BIDDER EXPERIENCE**		**50**
1.1	**Previous experience in Statistics and Statistical Consulting Services.** The bidder must submit appointment letters, completion certificates and signed and verifiable client reference letters for each project claimed.	10 or more relevant completed Statistics assignments **– 50 points**	**50**
		8–9 relevant completed assignments **– 40 points**	
		6–7 relevant completed assignments **– 30 points**	
		4–5 relevant completed assignments **– 20 points**	
		2–3 relevant completed assignments **– 10 points**	
		Fewer than 2 relevant completed assignments or insufficient/unverifiable evidence **– 0 points**	
2	**KEY PERSONNEL**		**50**
2.1	**Lead / Principal Statistician.** Must possess a master's degree or PhD majoring in Statistics, Mathematical Statistics, Applied Statistics, Statistical Sciences or equivalent relevant field. Experience must include sampling, weighting, survey design, statistical modelling and data analysis.	10 or more years relevant professional experience **– 20 points**	**20**
		7–9 years relevant professional experience **– 15 points**	
		4–6 years relevant professional experience **– 10 points**	
		1–3 years relevant professional experience **– 5 points**	
		No relevant experience or insufficient evidence **– 0 points**	
2.2	**Senior Statistician / Statistical Methodologist.** Must possess a relevant Honours Degree, master's degree or equivalent recognized qualification in Statistics, Mathematical Statistics, Applied Statistics, Statistical	10 or more years relevant experience **– 15 points**	**15**
		7–9 years relevant experience – **12 points**	

	Sciences or related field. Experience must include statistical methodology, sampling, survey design, modelling and statistical analysis.	4–6 years relevant experience – **9 points**	
		1–3 years relevant experience – **5 points**	
		No relevant experience or insufficient evidence **– 0 points**	
2.3	**Statistician / Statistical Analyst.** Must possess a relevant bachelor's degree or higher qualification in Statistics, Mathematical Statistics, Applied Statistics, Statistical Sciences or related field. Experience must demonstrate competence in statistical analysis, data management, statistical software, interpretation and reporting.	7 or more years relevant experience **– 15 points**	**15**
		5–6 years relevant experience – **10 points**	
		3–4 years relevant experience **– 7 points**	
		1–2 years relevant experience **– 3 points**	
		No relevant experience or insufficient evidence **– 0 points**	
TOTAL			**100**
MINIMUM QUALIFYING SCORE		**80%**	**80/100**

6.9. MEDIA AND MARKETING

6.9.1. MANDATORY MEDIA AND MARKETING PROFESSIONAL REQUIREMENTS

a) A bidder submitting for Media and Marketing Services must:

i. Nominate a Lead / Principal Marketing and Communications Specialist, with a relevant recognized academic qualification in Marketing, Communications, Media Studies, Journalism, Public Relations, Integrated Marketing Communications or an equivalent relevant field.
ii. Nominate a Marketing / Communications Specialist and a Digital Marketing / Media Specialist, with relevant academic qualifications and demonstrable professional experience in their respective areas of expertise.
iii. Demonstrate capacity to provide media planning and buying, advertising, digital marketing, social media management, branding, content development, public awareness campaigns and related media and marketing services.
iv. Submit for each key person: certified qualification, proof of relevant professional affiliation/accreditation where applicable, detailed CV and a personnel consent/availability declaration duly signed by the nominated person and commissioned by a Commissioner of Oaths.

b) Failure to meet the applicable mandatory professional and regulatory requirements will render the bid non-responsive and it will not proceed to functionality evaluation.

6.9.2. FUNCTIONALITY EVALUATION

ITEM No.	FUNCTIONALITY CRITERIA	BID RATING	WEIGHTING
1	**COMPANY / BIDDER EXPERIENCE**		**50**
1.1	**Previous experience in Media and Marketing Services.** The bidder must demonstrate experience in the provision of marketing, advertising, integrated marketing communications, media planning, digital marketing, social media, branding, content development, public awareness campaigns and related media and marketing services. The bidder must submit appointment letters, completion certificates and signed and verifiable client reference letters for each project claimed.	10 or more relevant completed Media and Marketing assignments **– 50 points**	**50**
		8–9 relevant completed assignments **– 40 points**	
		6–7 relevant completed assignments **– 30 points**	
		4–5 relevant completed assignments **– 20 points**	
		2–3 relevant completed assignments **– 10 points**	
		Fewer than 2 relevant completed assignments or insufficient/unverifiable evidence **– 0 points**	
2	**KEY PERSONNEL**		**50**
2.1	**Lead / Principal Marketing and Communications Specialist.** Must possess a relevant bachelor's degree or higher qualification in Marketing, Communications, Media Studies, Journalism, Public Relations, Integrated Marketing Communications or equivalent relevant field. The nominated person must demonstrate senior experience in developing and managing integrated marketing and communication campaigns.	10 or more years relevant experience **– 20 points**	**20**
		7–9 years relevant experience **– 15 points**	
		4–6 years relevant experience **– 10 points**	
		1–3 years relevant experience **– 5 points**	
		No relevant experience or insufficient evidence **– 0 points**	
2.2	**Marketing / Communications Specialist.** Must possess a relevant bachelor's degree or higher qualification in Marketing, Communications, Media Studies, Journalism, Public Relations, Integrated Marketing Communications or equivalent relevant field. Experience must demonstrate competence in marketing strategy, campaign development, communications, content development and brand management.	10 or more years relevant experience **– 15 points**	**15**
		7–9 years relevant experience **– 12 points**	
		4–6 years relevant experience **– 9 points**	
		1–3 years relevant experience **– 5 points**	
		No relevant experience or insufficient evidence **– 0 points**	

2.3	**Digital Marketing / Media Specialist.** Must possess a relevant Diploma, bachelor's degree or higher qualification in Digital Marketing, Marketing, Communications, Media Studies, Journalism or equivalent relevant field. Experience must demonstrate competence in digital marketing, social media management, digital campaigns, content creation, media platforms and campaign performance monitoring.	7 or more years relevant experience **– 15 points**	**15**
		5–6 years relevant experience **– 10 points**	
		3–4 years relevant experience **– 7 points**	
		1–2 years relevant experience **– 3 points**	
		No relevant experience or insufficient evidence **– 0 points**	
TOTAL			**100**
	MINIMUM QUALIFYING SCORE	**80%**	**80/100**

6.10. TOURISM AND EVENT ORGANIZING

6.10.1. MANDATORY TOURISM AND EVENT ORGANIZING PROFESSIONAL REQUIREMENTS

a) A bidder submitting for Tourism and Event Organizing Services must:

i. Nominate a Lead / Principal Tourism and Events Specialist, with a relevant recognized qualification in Tourism Management, Tourism Development, Hospitality Management, Events Management, Project Management, Marketing, Development Studies or an equivalent relevant field.
ii. Nominate an Event Management / Events Coordinator, with relevant academic qualification and demonstrable experience in planning, coordination and execution of events.
iii. Demonstrate capacity and experience to provide tourism development and promotion, destination marketing, event planning and management, stakeholder coordination, event logistics, visitor experience management and related tourism and events services.
iv. Where an assignment includes the provision of tourist guiding services, the persons performing such functions must comply with the applicable statutory tourist guide registration requirements.
v. Submit for each key person: certified qualification, proof of relevant professional affiliation/accreditation where applicable, detailed CV and a personnel consent/availability declaration duly signed by the nominated person and commissioned by a Commissioner of Oaths.

b) Failure to meet the applicable mandatory professional and regulatory requirements will render the bid non-responsive and it will not proceed to functionality evaluation.

6.10.2. FUNCTIONALITY EVALUATION

ITEM No.	FUNCTIONALITY CRITERIA	BID RATING	WEIGHTING
1	**COMPANY / BIDDER EXPERIENCE**		**50**
1.1	**Previous experience in Tourism and Event Organizing Services.** The bidder must demonstrate experience in tourism development and promotion, destination marketing, tourism programmes, event planning and management, conferences, festivals, exhibitions, community events, stakeholder coordination and related tourism and event services. The bidder must submit appointment letters, completion certificates and signed and verifiable client reference letters for each assignment claimed.	10 or more relevant completed Tourism and Event Organizing assignments – **50 points**	50
		8–9 relevant completed assignments – **40 points**	
		6–7 relevant completed assignments – **30 points**	
		4–5 relevant completed assignments – **20 points**	
		2–3 relevant completed assignments – **10 points**	
		Fewer than 2 relevant completed assignments or insufficient/unverifiable evidence – **0 points**	
2	**KEY PERSONNEL**		**50**
2.1	**Lead / Principal Tourism and Events Specialist.** Must possess a relevant bachelor's degree or higher qualification in Tourism Management, Tourism Development, Hospitality Management, Events Management, Project Management, Marketing, Development Studies or equivalent relevant field. Must demonstrate senior experience in tourism development, destination marketing, tourism programmes and/or event management.	10 or more years relevant experience – **20 points**	**20**
		7–9 years relevant experience – **15 points**	
		4–6 years relevant experience – **10 points**	
		1–3 years relevant experience – **5 points**	
		No relevant experience or insufficient evidence – **0 points**	
2.2	**Event Management Specialist / Event Coordinator.** Must possess a relevant bachelor's degree, Diploma or higher qualification in Events Management, Hospitality Management, Tourism Management, Project Management, Marketing, Communications or equivalent relevant fields. Experience must demonstrate competence in event planning, logistics, stakeholder coordination, programme coordination, supplier management and event execution.	10 or more years relevant experience – **15 points**	**15**
		7–9 years relevant experience – **12 points**	
		4–6 years relevant experience – **9 points**	
		1–3 years relevant experience **– 5 points**	
		No relevant experience or insufficient evidence – **0 points**	

2.3	**Tourism Development / Marketing Specialist.** Must possess a relevant bachelor's degree, Diploma or higher qualification in Tourism Management, Tourism Development, Marketing, Hospitality Management, Communications, Development Studies or equivalent relevant field. Experience must demonstrate competence in tourism promotion, destination marketing, stakeholder engagement, tourism product development, visitor experience and/or tourism-related marketing.	7 or more years relevant experience – **15 points**	**15**
		5–6 years relevant experience – **10 points**	
		3–4 years relevant experience – **7 points**	
		1–2 years relevant experience – **3 points**	
		No relevant experience or insufficient evidence – **0 points**	
TOTAL			**100**
MINIMUM QUALIFYING SCORE		**80%**	**80/100**

6.11. SOCIAL FACILITATION AND MEDIATION

6.11.1. MANDATORY SOCIAL FACILITATION AND MEDIATION PROFESSIONAL REQUIREMENTS

a) A bidder submitting for Social Facilitation and Mediation Services must:

i. Nominate a Lead / Principal Social Facilitator and Mediator, with a relevant bachelor's degree or higher qualification in Social Sciences, Community Development, Development Studies, Sociology, Psychology, Social Work, Public Management, Development Management or an equivalent relevant field, together with recognized mediation training or accreditation issued by an established mediation training institution or recognized mediation professional body.
ii. Nominate a Social Facilitation / Community Engagement Specialist, with a relevant academic qualification and demonstrable experience in community engagement, stakeholder facilitation, social mobilization, community development and conflict resolution.
iii. Nominate a Professional Mediator / Dispute Resolution Specialist, with appropriate formal training in mediation and demonstrated experience in mediation, dispute resolution, conflict management and stakeholder dispute facilitation.
iv. Submit for each key person: certified qualification, proof of relevant mediation accreditation/professional affiliation where applicable, detailed CV and a personnel consent/availability declaration duly signed by the nominated person and commissioned by a Commissioner of Oaths.

b) Failure to meet the applicable mandatory professional and regulatory requirements will render the bid non-responsive and it will not proceed to functionality evaluation.

6.11.2. FUNCTIONALITY EVALUATION

ITEM No.	FUNCTIONALITY CRITERIA	BID RATING	WEIGHTING
1	**COMPANY / BIDDER EXPERIENCE**		**50**
1.1	**Previous experience in Social Facilitation and Mediation Services.** The bidder must demonstrate experience in social facilitation, community participation, stakeholder engagement, community mobilization, conflict resolution, mediation, dispute management, public participation and related social-development services. The bidder must submit appointment letters, completion certificates and signed and verifiable client reference letters for each assignment claimed.	10 or more relevant completed Social Facilitation and/or Mediation assignments **– 50 points**	**50**
		8–9 relevant completed assignments **– 40 points**	
		6–7 relevant completed assignments **– 30 points**	
		4–5 relevant completed assignments **– 20 points**	
		2–3 relevant completed assignments **– 10 points**	
		Fewer than 2 relevant completed assignments or insufficient/unverifiable evidence **– 0 points**	
2	**KEY PERSONNEL**		**50**
2.1	**Lead / Principal Social Facilitator and Mediator.** Must possess a relevant bachelor's degree or higher qualification in Social Sciences, Community Development, Development Studies, Sociology, Psychology, Social Work, Public Management, Development Management or equivalent relevant field, together with appropriate mediation training/accreditation. Must demonstrate senior experience in social facilitation, community engagement, stakeholder management and mediation/conflict resolution.	10 or more years relevant experience **– 20 points**	**20**
		7–9 years relevant experience **– 15 points**	
		4–6 years relevant experience **– 10 points**	
		1–3 years relevant experience **– 5 points**	
		No relevant experience or insufficient evidence **– 0 points**	
2.2	**Social Facilitation / Community Engagement Specialist.** Must possess a relevant bachelor's degree, Diploma or higher qualification in Social Sciences, Community Development, Development Studies, Sociology, Social Work, Public Management, Development Management or equivalent relevant field. Experience must demonstrate competence in community participation, stakeholder engagement, social mobilization, community liaison and facilitation.	10 or more years relevant experience **– 15 points**	**15**
		7–9 years relevant experience **– 12 points**	
		4–6 years relevant experience **– 9 points**	
		1–3 years relevant experience **– 5 points**	
		No relevant experience or insufficient evidence **– 0 points**	
2.3	**Professional Mediator / Dispute Resolution Specialist.** Must possess a relevant bachelor's degree, Diploma or equivalent qualification, together with recognized mediation training/accreditation. Experience must demonstrate competence in mediation, conflict resolution, dispute management, negotiation, dialogue facilitation and resolution of stakeholder/community disputes.	7 or more years relevant experience **– 15 points**	**15**
		5–6 years relevant experience **– 10 points**	
		3–4 years relevant experience **– 7 points**	
		1–2 years relevant experience **– 3 points**	
		No relevant experience or insufficient evidence **– 0 points**	
TOTAL			**100**
MINIMUM QUALIFYING SCORE		**80%**	**80/100**

6.12. TRANSACTIONAL ADVISORY

6.12.1. MANDATORY TRANSACTIONAL ADVISORY PROFESSIONAL REQUIREMENTS

a) A bidder submitting for Transactional Advisory Services must:

i. Nominate a Lead / Principal Transaction Advisor with a relevant honours' degree or higher qualification in Finance, Economics, Accounting, Business Administration, Engineering, Actuarial Science, Development Finance or an equivalent relevant field, with substantial experience in transaction advisory and financial/commercial structuring.
ii. Nominate a Financial / Transaction Advisory Specialist with relevant academic qualification and demonstrable experience in financial modelling, financial analysis, project finance, transaction structuring and investment appraisal.
iii. Nominate a Commercial / Transaction Structuring Specialist with relevant academic qualifications and demonstrable experience in commercial structuring, transaction due diligence, procurement, negotiations, contract structuring and/or infrastructure transactions.
iv. Where the assignment involves a Public-Private Partnership (PPP), the bidder must demonstrate appropriate experience and capacity in PPP feasibility studies, transaction structuring, procurement and financial close, and must comply with the applicable requirements of the MFMA and Municipal PPP Regulations.
v. Where a nominated professional is required by the nature of the services to hold a specific statutory or professional registration, the bidder must submit a certified valid professional registration certificate.
vi. Submit for each key person: certified qualification, detailed CV demonstrating relevant transaction advisory experience and a personnel consent/availability declaration duly signed by the nominated person and commissioned by a Commissioner of Oaths.

b) Failure to meet the applicable mandatory professional and regulatory requirements will render the bid non-responsive and it will not proceed to functionality evaluation.

6.12.2. FUNCTIONALITY EVALUATION

ITEM No.	FUNCTIONALITY CRITERIA	BID RATING	WEIGHTING
1	**COMPANY / BIDDER EXPERIENCE**		**50**
1.1	**Previous experience in Transactional Advisory Services.** The bidder must demonstrate experience in transaction advisory, financial and commercial structuring, feasibility studies, financial modelling, project finance, PPP transactions, infrastructure transactions, investment appraisal, due diligence, procurement advisory and/or related transaction advisory services. The bidder must submit appointment letters, completion certificates and signed and verifiable client reference letters for each assignment claimed. Only completed and relevant assignments will be considered.	5 relevant completed Transactional Advisory assignments – **50 points**	**50**
		4 relevant completed assignments – **40 points**	
		3 relevant completed assignments – **30 points**	
		2 relevant completed assignments – **20 points**	
		1 relevant completed assignment – **10 points**	
		0 relevant completed assignments – **0 points**	
2	**KEY PERSONNEL**		**50**
2.1	**Lead / Principal Transaction Advisor.** Must possess an honours' degree or higher qualification in Finance, Economics, Accounting, Business Administration, Engineering, Actuarial Science, Development Finance or an equivalent relevant field. Experience must demonstrate senior responsibility for transaction advisory, financial/commercial structuring, project finance, PPPs, infrastructure transactions and/or major investment transactions.	10 or more years relevant experience **– 20 points**	**20**
		7–9 years relevant experience **– 15 points**	
		4–6 years relevant experience **– 10 points**	
		1–3 years relevant experience **– 5 points**	
		No relevant experience or insufficient evidence **– 0 points**	
2.2	**Financial / Transaction Advisory Specialist.**	10 or more years relevant experience **– 15 points**	**15**

	Must possess a relevant bachelor's degree or higher qualification in Finance, Economics, Accounting, Financial Management, Development Finance, Actuarial Science or equivalent relevant field. Experience must demonstrate competence in financial modelling, financial analysis, project finance, investment appraisal, financial structuring and transaction due diligence.	7–9 years relevant experience **– 12 points**	
		4–6 years relevant experience **– 9 points**	
		1–3 years relevant experience **– 5 points**	
		No relevant experience or insufficient evidence **– 0 points**	
2.3	**Commercial / Transaction Structuring Specialist.** Must possess a relevant bachelor's degree or higher qualification in Business Administration, Commerce, Economics, Finance, Law, Engineering, Development Studies or equivalent relevant field. Experience must demonstrate competence in commercial structuring, transaction due diligence, procurement, negotiations, contract structuring, PPPs and/or infrastructure transactions.	7 or more years relevant experience **– 15 points**	**15**
		5–6 years relevant experience **– 10 points**	
		3–4 years relevant experience **– 7 points**	
		1–2 years relevant experience **– 3 points**	
		No relevant experience or insufficient evidence **– 0 points**	
	TOTAL		**100**
	MINIMUM QUALIFYING SCORE	**80%**	**80/100**

6.13. PROJECT MANAGEMENT

6.13.1. MANDATORY PROJECT MANAGEMENT PROFESSIONAL REQUIREMENTS

a) A bidder submitting for Project Management Services must:

i. Nominate a Professional Construction Project Manager (PrCPM) or Professional Construction Manager (PrCM) with valid registration with the South African Council for the Project and Construction Management Professions (SACPCMP) and relevant academic qualifications.
ii. Nominate a suitably qualified Project Manager / Construction Project Manager with relevant academic qualifications, valid professional registration where applicable, and demonstrable experience in the management of built environment and/or infrastructure projects.
iii. Demonstrate capacity to provide project management services including, but not limited to, project planning, project coordination, programme and time management, cost management, risk management, quality management, contract administration, stakeholder coordination, monitoring and reporting, and project close-out.
iv. Submit for each key person: certified qualification, certified valid professional registration certificate, detailed CV and a personnel consent/availability declaration

duly signed by the nominated person and commissioned by a Commissioner of Oaths.

b) Failure to meet the applicable mandatory professional and regulatory requirements will render the bid non-responsive and it will not proceed to functionality evaluation.

6.13.2. FUNCTIONALITY EVALUATION

ITEM No.	FUNCTIONALITY CRITERIA	BID RATING	WEIGHTING
1	**COMPANY / BIDDER EXPERIENCE**		**50**
1.1	**Previous experience in Project Management Services.** The bidder must demonstrate experience in the management of municipal, public-sector, infrastructure, building and/or other built-environment projects, including project planning, coordination, programme management, cost management, risk management, quality management, contract administration, monitoring and reporting and project close-out. The bidder must submit appointment letters, completion certificates and signed and verifiable client reference letters for each assignment claimed.	10 or more relevant completed Project Management assignments **– 50 points**	**50**
		8–9 relevant completed assignments **– 40 points**	
		6–7 relevant completed assignments **– 30 points**	
		4–5 relevant completed assignments **– 20 points**	
		2–3 relevant completed assignments **– 10 points**	
		Fewer than 2 relevant completed assignments or insufficient/unverifiable evidence **– 0 points**	
2	**KEY PERSONNEL**		**50**
2.1	**Lead / Principal Project Manager.** Must be registered as a Professional Construction Project Manager (PrCPM) or Professional Construction Manager (PrCM) with SACPCMP and possess a relevant honours' degree or higher qualification in Project Management, Construction Management, Built Environment, Engineering or an equivalent relevant field. Experience must demonstrate senior responsibility for the management and delivery of complex-built environment and/or infrastructure projects.	**10 or more years relevant experience – 20 points**	**20**
		7–9 years relevant experience **– 15 points**	
		4–6 years relevant experience **– 10 points**	
		1–3 years relevant experience **– 5 points**	
		No relevant experience or insufficient evidence **– 0 points**	
2.2	**Senior Project Manager / Construction Project Manager.** Must possess a relevant bachelor's degree or higher qualification in Project Management, Construction Management, Built Environment, Engineering or an equivalent relevant field and valid professional registration with SACPCMP. Experience must demonstrate competence in project planning, programme management, cost management, risk management, contract administration, quality management and stakeholder coordination.	10 or more years relevant experience **– 15 points**	**15**
		7–9 years relevant **experience – 12 points**	
		4–6 years relevant experience **– 9 points**	
		1–3 years relevant experience **– 5 points**	
		No relevant experience or insufficient evidence **– 0 points**	
2.3	**Project Management Officer / Project Coordinator.** Must possess a relevant Diploma, bachelor's degree or higher qualification in Project Management, Construction	7 or more years relevant experience **– 15 points**	**15**
		5–6 years relevant experience **– 10 points**	

	Management, Built Environment, Engineering or an equivalent relevant field. Experience must demonstrate competence in project coordination, project monitoring, reporting, programme tracking, documentation, stakeholder coordination and project administration.	3–4 years relevant experience **– 7 points**	
		1–2 years relevant experience – 3 points	
		No relevant experience or insufficient evidence **– 0 points**	
TOTAL			**100**
MINIMUM QUALIFYING SCORE		**80%**	**80/100**

A. Service Provider Prerequisites / Requirements

- All bidders must attend compulsory briefing session
- Company registration certificate
- Joint Venture Agreement where applicable
- Letter from SARS with a tax valid pin
- Terms of reference fully completed and each page to be initialed
- Statement of Municipality Accounts as proof of residential address not in arrears for more than 90 days, if leasing, provide the lease agreement and copy of the owner's statement of municipality account not in arrears for more than 90 days or the proof of residential address by a traditional authority in case of a non-ratable area for the **business and all company directors** (Not older than three months)
- Latest registration report of central supplier database (CSD) with valid reference number
- In case of qualifications obtained abroad, SAQA evaluation should be attached. (Failure to submit will result in disqualification)

B. Functionality Evaluation Criteria

C. Evaluation Criteria

The project will be evaluated on an 80/20-point score system (80 Price and 20)

Responsive bids will be further evaluated using a point system which awards on the basis set out in the table below:

	POINTS
PRICE	**80**
SPECIFIC GOALS	**20**
Total points for Price and SPECIFIC GOALS	**100**

POINTS AWARDED FOR PRICE

1. THE 80/20 PREFERENCE POINT SYSTEMS

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

80/20

$$Ps = 80\left(1 = \frac{Pt\text{-}Pmin}{Pmin}\right)$$

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

1.

2. Pmin = Price of lowest acceptable tender

2. Pricing

Ba-Phalaborwa Municipality will source quotations from successful bidders on the panel of contractors

3. Responsive bids will be further evaluated using a point system which awards on the basis set out in the table below:

4. POINTS AWARDED FOR SPECIFIC GOALS

D. THIRD STAGE: SPECIFIC GOALS POINTS SYSTEM

Specific Goal	Number of points allocated	Verification documents
Black	2.5	CSD Report/ ID copies
Women	2.5	ID copies/CSD report
Youth	5	ID Copies/CSD report
Locality	10	Proof of residential address/ municipal statement
	20	

COMPULSORY MUNICIPAL BID DOCUMENTS

INVITATION TO BID

(a) YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE BA-PHALABORWA LOCAL MUNICIPALITY

BID NUMBER: …… CLOSING DATE: …….. CLOSING TIME: ……

DESCRIPTION……

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

BID DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT:

Cnr Nelson Mandela & Sealane Street
Phalaborwa
1390

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

(b) The bid box is generally open 24 hours a day, 7 days a week.

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

THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2011, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT

(d) NB: NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE (as defined in Regulation 1 of the Local Government: Municipal Supply Chain Management Regulations)

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 ATTACHED? (MBD 2)
YES/NO

ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS/SERVICES/WORKS OFFERED? YES/NO

(IF YES ENCLOSE PROOF)

SIGNATURE OF BIDDER
……..

DATE ……

CAPACITY UNDER WHICH THIS BID IS SIGNED
……

TOTAL BID PRICE……

TOTAL NUMBER OF ITEMS OFFERED……

MBD 2

TAX CLEARANCE CERTIFICATE

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 form TCC001 "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. Copies of form TCC 001 are available from any SARS branch office nationally or on the website www.sars.gov.za.
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. 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.
6. Exemption to the provision of a Tax Clearance Certificate will be granted provided that:
    a) The bidder is registered on the vendor database of the municipality and a valid tax clearance certificate was submitted together with the application for registration
    b) If the closing date of the price quotation or bid falls within the expiry date of the tax clearance certificate that is in the municipality's possession.

MBD 4

DECLARATION OF INTEREST

1. No bid will be accepted from persons in the service of the state[1].

2. Any person, having a kinship with persons in the service of the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid. In view of possible allegations of favoritism, should the resulting bid, or part thereof, be awarded to persons connected with or related to persons in service of the state, it is required that the bidder or their authorized representative declare their position in relation to the evaluating/adjudicating authority.

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

3.1 Full Name of bidder or his or her representative:……..

3.2 Identity Number: …….

3.3 Position occupied in the Company (director, trustee, shareholder):……..

3.4 Company Registration Number: …….

3.5 Tax Reference Number:……

3.6 VAT Registration Number: ……

3.7 The names of all directors / trustees / shareholders members, their individual identity numbers and state employee numbers must be indicated in paragraph 4 below.

3.8 Are you presently in the service of the state? **YES / NO**

3.8.1 If yes, furnish particulars. ….……
……..

[1]MSCM Regulations: "in the service of the state" means to be –

(a) a member of –
  (i) any municipal council;
  (ii) any provincial legislature; or
  (iii) the national Assembly or the national Council of provinces;

(b) a member of the board of directors of any municipal entity;
(c) an official of any municipality or municipal entity;
(d) an employee of 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); (e) a member of the accounting authority of any national or provincial public entity; or (f) an employee of Parliament or a provincial legislature.

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

3.9 Have you been in the service of the state for the past twelve months? ……**YES / NO**

3.9.1 If yes, furnish particulars……..……..

……

3.10 Do you have any relationship (family, friend, other) with persons In the service of the state and who may be involved with The evaluation and or adjudication of this bid? **YES / NO**

3.10.1 If yes, furnish particulars.

……

……

3.11 Are you, aware of any relationship (family, friend, other) between Any other bidder and any persons in the service of the state who May be involved with the evaluation and or adjudication of this bid? **YES / NO**

3.11.1 If yes, furnish particulars

……

……

3.12 Are any of the company's directors, trustees, managers, Principle shareholders or stakeholders in service of the state? **YES / NO**

3.12.1 If yes, furnish particulars.

……

……

3.13 Are any spouse, child or parent of the company's directors? Trustees, managers, principle shareholders or stakeholders In service of the state? **YES / NO**

3.13.1 If yes, furnish particulars.

……

……

3.14 Do you or any of the directors, trustees, managers, Principle shareholders, or stakeholders of this company Have any interest in any other related companies or Business whether or not they are bidding for this contract. **YES / NO**

3.14.1 If yes, furnish particulars:

……..

……..

(a) 4. Full details of directors / trustees / members / shareholders.

Full Name	Identity Number	State Employee Number

……..
Signature

……..
Date

……

Capacity

……

Name of Bidder

MBD 6.1

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

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

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

---

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

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

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

(*delete whichever is not applicable for this tender*).

a) The applicable preference point system for this tender is the 90/10 preference point system.

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

c) Either the 90/10 or 80/20 preference point system will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

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

(a) Price; and

(b) Specific Goals.

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

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	**100**

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

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

2. DEFINITIONS

(a) **"tender"** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;

(b) **"price"** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;

(c) **"rand value"** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

(d) **"tender for income-generating contracts"** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and

(e) **"the Act"** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

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

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

80/20 **or** **90/10**

$$Ps = 80\left(1 - \frac{Pt - P\,min}{P\,min}\right) \text{ or } \quad Ps = 90\left(1 - \frac{Pt - P\,min}{P\,min}\right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

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

3.2.1. **POINTS AWARDED FOR PRICE**

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

80/20 **or** **90/10**

$$Ps = 80\left(1 + \frac{Pt - P\,max}{P\,max}\right) \text{ or } \quad Ps = 90\left(1 + \frac{Pt - P\,max}{Pmax}\right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmax = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:

4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—

(a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or

(b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,

then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

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

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

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

The specific goals allocated points in terms of this 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)
100% Black owned				
100% Black Woman				
100% Black Youth				
100% Locality (within Ba-Phalaborwa Jurisdiction)				

DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name of company/firm…….

4.4. Company registration number: ……...

4.5. TYPE OF COMPANY/ FIRM

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

[TICK APPLICABLE BOX]

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

i) The information furnished is true and correct;

ii) The preference points claimed are in accordance with the General Conditions as

indicated in paragraph 1 of this form;

iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;

iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –

(a) disqualify the person from the tendering process;

(b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;

(c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;

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

(e) forward the matter for criminal prosecution, if deemed necessary.

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

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

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

---

3. GENERAL CONDITIONS

3.1 The following preference point systems are applicable to invitations to tender:

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

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

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

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

(a) Price; and

(b) Specific Goals.

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

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	**80**
SPECIFIC GOALS	**20**
Total points for Price and SPECIFIC GOALS	**100**

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

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

4. DEFINITIONS

(a) **"tender"** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;

(b) **"price"** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;

(c) **"rand value"** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

(d) **"tender for income-generating contracts"** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal

of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and

(e) **"the Act"** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

5. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 PREFERENCE POINT SYSTEMS

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

80/20

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

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

6. POINTS AWARDED FOR SPECIFIC GOALS

4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:

4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—

(a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system: or

(b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system, then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

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

The 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 (80/20 system) (To be completed by the organ of state**	**Number of points claimed (80/20 system)** **(To be completed by the tenderer)**
• 100% company owned/director/s/shareholders by people who are Black • 100% Black woman • 100% Black Youth • 100% Locality (residing within Ba-Phalaborwa Jurisdiction)		

DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name of company/firm…….

4.4. Company registration number: ……...

4.5. TYPE OF COMPANY/ FIRM

- ❒ Partnership/Joint Venture / Consortium
- ❒ One-person business/sole propriety
- ❒ Close corporation
- ❒ Public Company
- ❒ Personal Liability Company (Pty) Limited
- ❒ Non-Profit Company
- ❒ State Owned Company [TICK APPLICABLE BOX]

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

i) The information furnished is true and correct.

ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form.

iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct.

iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –

(a) disqualify the person from the tendering process.

(b) recover costs, losses, or damages it has incurred or suffered as a result of that person's conduct.

(c) cancel the contract and claim any damages which it has suffered as a result of having to make less favorable arrangements due to such cancellation.

(d) recommend that the tenderer or contractor, its shareholders and

directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and

(e) forward the matter for criminal prosecution, if deemed necessary.

.....

SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME: .....

DATE: .....

ADDRESS: .....

.....

.....

MBD 7.1

1. CONTRACT FORM - PURCHASE OF GOODS/SERVICES

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

2. PART 1 (TO BE FILLED IN BY THE BIDDER)

1. I hereby undertake to supply all or any of the goods and/or services described in the attached bidding documents to (name of institution)……..…… in accordance with the requirements and 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 time of 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;
   - Proof of Tax Compliance Status;
   - Pricing schedule(s);
   - Technical Specification(s);
   - Preference claim form for Preferential Procurement in terms of the Preferential Procurement Regulations;
   - 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 goods and/or works 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 authorized to sign this contract.

NAME (PRINT) ……

CAPACITY ……

SIGNATURE ……

NAME OF FIRM ……

DATE ……

WITNESSES

1 ……

2. ……

DATE: ……

MBD 7.1

CONTRACT FORM - PURCHASE OF GOODS/SERVICES

3. PART 2 (TO BE FILLED IN BY THE PURCHASER)

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

2. An official order indicating delivery instructions is forthcoming.
3. I undertake to make payment for the goods/services delivered in accordance with the terms and conditions of the contract, within 30 (thirty) days after receipt of an invoice accompanied by the delivery note.

ITEM NO.	PRICE (ALL APPLICABLE TAXES INCLUDED)	BRAND	DELIVERY PERIOD	TOTAL PREFERENCE POINTS CLAIMED	POINTS CLAIMED FOR EACH SPECIFIC GOAL

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

SIGNED AT ……ON……

NAME (PRINT) ……..

SIGNATURE ……..

OFFICIAL STAMP

WITNESSES

1. ……

2. ……

DATE ……

4. 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.

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

7. 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.
8. The following documents shall be deemed to form and be read and construed as part of this agreement:
   (iv) Bidding documents, *viz*
   - Invitation to bid;
   - Proof of tax compliance status;
   - Pricing schedule(s);
   - Filled in task directive/proposal;
   - Preference claim form for Preferential Procurement in terms of the Preferential Procurement Regulations;
   - Declaration of interest;
   - Declaration of Bidder's past SCM practices;
   - Certificate of Independent Bid Determination;
   - Special Conditions of Contract;

   (v) General Conditions of Contract; and
   (vi) Other (specify)
9. 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.
10. 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.
11. I declare that I have no participation in any collusive practices with any bidder or any other person regarding this or any other bid.
12. I confirm that I am duly authorised to sign this contract.

NAME (PRINT) .....

CAPACITY .....

SIGNATURE .....

NAME OF FIRM .....

DATE .....

WITNESSES

1 .....

2 .....

DATE: .....

CONTRACT FORM - RENDERING OF SERVICES

6. PART 2 (TO BE FILLED IN BY THE PURCHASER)

4. 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).

5. An official order indicating service delivery instructions is forthcoming.
6. 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**	**TOTAL PREFERENCE POINTS CLAIMED**	**POINTS CLAIMED FOR EACH SPECIFIC GOAL**

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

SIGNED AT …… ON ……..

NAME (PRINT)…….

SIGNATURE ……

OFFICIAL STAMP

WITNESSES

1 ……

2 ……

DATE: ……..

7. CONTRACT FORM - TENDER FOR INCOME-GENERATING CONTRACTS[1]

THIS FORM MUST BE FILLED IN DUPLICATE BY BOTH THE SUCCESSFUL BIDDER (PART 1) AND THE LESSOR/ SELLER (PART 2). BOTH FORMS MUST BE SIGNED IN THE ORIGINAL SO THAT THE SUCCESSFUL BIDDER AND THE LESSOR/ SELLER WOULD BE IN POSSESSION OF ORIGINALLY SIGNED CONTRACTS FOR THEIR RESPECTIVE RECORDS.

8. PART 1 (TO BE FILLED IN BY THE BIDDER)

13. I hereby undertake to lease property/ purchase all or any of the goods and/or services described in the attached bidding documents from (name of institution)……..…..…… in accordance with the requirements stipulated in (bid number)……..…….. at the price/s quoted. My offer/s remain binding upon me and open for acceptance by the seller during the validity period indicated and calculated from the closing time of bid.
14. The following documents shall be deemed to form and be read and construed as part of this agreement:
    (vii) Bidding documents, *viz*
    - Invitation to bid;
    - Proof of tax compliance status;
    - Pricing schedule(s);
    - Preference claim form for Preferential Procurement in terms of the Preferential Procurement Regulations;
    - Declaration of interest;
    - Declaration of Bidder's past SCM practices;
    - Special Conditions of Contract;

    (viii) General Conditions of Contract; and
    (ix) Other (specify)
15. I confirm that I have satisfied myself as to the correctness and validity of my bid; that the price(s) quoted covers the leased property/ all the goods and/or services specified in the bidding documents; that the price(s) cover all my obligations and I accept that any mistakes regarding price(s) and calculations will be at my own risk.
16. 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.
17. I undertake to make payment for the leased property/ goods/services as specified in the bidding documents.
18. I declare that I have no participation in any collusive practices with any bidder or any other person regarding this or any other bid.
19. I confirm that I am duly authorised to sign this contract.

NAME (PRINT) ……

CAPACITY ……

SIGNATURE ……

NAME OF FIRM ……

DATE ……

WITNESSES

1 .....

2 ……..

DATE: ……..

1 "Tender for income-generating contracts" has the same meaning as defined in the Preferential Procurement Regulations, 2022.

CONTRACT FORM - TENDER FOR INCOME-GENERATING CONTRACTS

9. PART 2 (TO BE FILLED IN BY THE LESSOR/ SELLER)

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

8. I undertake to make the leased property/ goods/services available in accordance with the terms and conditions of the contract.

ITEM NO.	DESCRIPTION	PRICE (ALL APPLICABLE TAXES INCLUDED)	TOTAL PREFERENCE POINTS CLAIMED	POINTS CLAIMED FOR EACH SPECIFIC GOAL

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

SIGNED AT ……ON……..

NAME (PRINT) …….

SIGNATURE …….

OFFICIAL STAMP

WITNESSES

3. …….

4. …….

DATE …….

MBD 8

DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

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

2 It serves as a declaration to be used by municipalities and municipal entities 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 rejected if that bidder, or any of its directors have:

a. abused the municipality's / municipal entity's supply chain management system or committed any improper conduct in relation to such system;
b. been convicted for fraud or corruption during the past five years;
c. willfully neglected, reneged on or failed to comply with any government, municipal or other public sector contract during the past five years; or
d. been listed in the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004).

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 of law outside the Republic of South Africa) for fraud or corruption during the past five years?	Yes ☐	No ☐
4.3.1	If so, furnish particulars:		
Item	**Question**	**Yes**	**No**
4.4	Does the bidder or any of its directors owe any municipal rates and taxes or municipal charges to the municipality / municipal entity, or to any other municipality / municipal entity, that is in arrears for more than three months?	Yes ☐	No ☐
4.4.1	If so, furnish particulars:		

4.5	Was any contract between the bidder and the municipality / municipal entity or any other organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	Yes ☐	No ☐
4.7.1	If so, furnish particulars:		

CERTIFICATION

I, THE UNDERSIGNED (FULL NAME)……..……

CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM 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**

MBD 9

CERTIFICATE OF INDEPENDENT BID DETERMINATION

1 This Municipal Bidding Document (MBD) 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 Municipal Supply Regulation 38 (1) prescribes that a supply chain management policy must provide measures for the combating of abuse of the supply chain management system, and must enable the accounting officer, among others, to:

a. take all reasonable steps to prevent such abuse;

b. reject the bid of any bidder if that bidder or any of its directors has abused the supply chain management system of the municipality or municipal entity or has committed any improper conduct in relation to such system; and

c. cancel a contract awarded to a person if the person committed any corrupt or fraudulent act during the bidding process or the execution of the contract.

4 This MBD 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 (MBD 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.

MBD 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 Municipality / Municipal Entity)

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

I certify, On behalfof:_____

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

BA-PHALABORWA MUNICIPALITY

Fraud and Corruption Declaration Form

I *(Name)* _____ duly authorized to act on behalf of *(Company name)* _____ hereby declare to Ba-Phalaborwa Municipality that the company:

a. it has declared to Ba-Phalaborwa Municipality any circumstances that could give rise to a conflict of interest or potential conflict of interest in relation to the current procurement action;
b. None of the directors of the company is employed by the state;
c. The company is not blacklisted by the national treasury;
d. Has not negotiated or tried to negotiate with any municipal official to try to gain information or preference to win the bid, if found the bidder's details will be submitted to national treasury for blacklisting of the company;
e. it has not granted and will not grant, has not sought and will not seek, has not attempted and will not attempt to obtain, and has not accepted and will not accept any direct or indirect benefit (financial or otherwise) arising from a procurement contract or the award thereof;
f. all the information submitted in the bid is truthful and there is no misrepresentation;
g. it adheres to the Prevention and Combating of Corrupt Activities Act 12 of 2004;
h. it is solvent and in a position to continue doing business for the period stipulated in the contract after contract signature, if awarded a contract by Ba-Phalaborwa Municipality;
i. it has zero tolerance to Fraud and Corruption and has appropriate procedures in place to prevent and respond to Fraud and Corruption in line with the legislation.

The Company understands that a false statement or failure to disclose any relevant information.

which may impact upon Ba-Phalaborwa Municipality's decision to award a contract may result in the disqualification of the company from the bidding exercise and/or the withdrawal of any offer of a contract with Ba-Phalaborwa Municipality. Furthermore, in case a contract has already been awarded, Ba-Phalaborwa Municipality shall be entitled to rescind the contract with immediate effect, in addition to any other remedies which the municipality may have by contract or by law.

Company Name:

……

Name and Title of duly authorized representative.

Name: ……

Date: ……Title: ……

Signature: ……

Witness

Name: ……..…… Signature …….. Date: ……