



FREE STATE DEVELOPMENT CORPORATION

**APPOINTMENT OF A SERVICE PROVIDER FOR THE SUPPLY AND INSTALLATION OF AN
ELECTRONIC DOCUMENT AND RECORDS MANAGEMENT SYSTEM (EDRMS) FOR THE
FREE STATE DEVELOPMENT CORPORATION**

BID NUMBER: FDC BID NO. 005/2026

COMPULSORY BRIEFING SESSION: 30 JULY 2026 AT 12:00

FDC HOUSE, 33 KELLNER STREET, WESTDENE, BLOEMFONTEIN

CLOSING DATE: 11 AUGUST 2026 AT 12:00

PREPARED BY:

FREE STATE DEVELOPMENT CORPORATION

33 KELLNER STREET

WESTDENE BLOEMFONTEIN

9301

TECHNICAL CONTACT PERSON: SYLVESTER MOHLOLI

**SUPPLY CHAIN MANAGEMENT CONTACT PERSON:
KELEBOGILE MOKOPI**

YOU ARE HEREBY INVITED TO SUBMIT A BID TO MEET THE REQUIREMENTS OF THE FREE STATE DEVELOPMENT CORPORATION	
BID NUMBER:	FDC BID NO. 005/2026
COMPULSORY BRIEFING SESSION DATE:	30 JULY 2026 AT 12:00
CLOSING DATE:	11 AUGUST 2026
CLOSING TIME:	12:00
CLOSING DATE FOR BID ENQUIRIES	All enquiries must be directed to sylvester@fdc.co.za before the 04 August 2026
PERIOD FOR WHICH BIDS ARE REQUIRED TO REMAIN OPEN FOR ACCEPTANCE:	120 days (submissions must be valid for 120 days after the closing date)
DESCRIPTION OF BID:	APPOINTMENT OF A SERVICE PROVIDER FOR THE SUPPLY AND INSTALLATION OF AN ELECTRONIC DOCUMENT AND RECORDS MANAGEMENT SYSTEM (EDRMS) FOR THE FREE STATE DEVELOPMENT CORPORATION
BID DOCUMENTS DELIVERY ADDRESS:	FDC BUILDING 33 KELLNER STREET WESTDENE BLOEMFONTEIN
NAME OF BIDDER:	
CONTACT PERSON:	
E-MAIL ADDRESS:	
TELEPHONE NUMBER:	
FAX NUMBER:	
BIDDER'S STAMP OR SIGNATURE	

INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE FREE STATE DEVELOPMENT CORPORATION					
BID NUMBER:	FDC BID NO. 005/2026	CLOSING DATE:	11 AUGUST 2026	CLOSING TIME:	12:00
DESCRIPTION	APPOINTMENT OF A SERVICE PROVIDER FOR THE SUPPLY AND INSTALLATION OF AN ELECTRONIC DOCUMENT AND RECORDS MANAGEMENT SYSTEM (EDRMS) FOR THE FREE STATE DEVELOPMENT CORPORATION				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT					
33 KELLNER STREET, WESTDENE, BLOEMFONTEIN					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	KELEBOGILE MOKOPI		CONTACT PERSON	SYLVESTER MOHLOLI	
TELEPHONE NUMBER	051 400 1500		TELEPHONE NUMBER	051 400 1500	
FACSIMILE NUMBER			FACSIMILE NUMBER		
E-MAIL ADDRESS	kele@fdc.co.za		E-MAIL ADDRESS	sylvester@fdc.co.za	
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	☐ Yes ☐ No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?		☐ Yes ☐ No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS					
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?				☐ YES ☐ NO	
DOES THE ENTITY HAVE A BRANCH IN THE RSA?				☐ YES ☐ NO	
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?				☐ YES ☐ NO	
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?				☐ YES ☐ NO	
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?				☐ YES ☐ NO	
IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.					

PART B

TERMS AND CONDITIONS FOR BIDDING

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

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

SIGNATURE OF BIDDER:

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

DATE:

TERMS OF REFERENCE

APPOINTMENT OF A SERVICE PROVIDER FOR THE SUPPLY AND INSTALLATION OF AN ELECTRONIC DOCUMENT AND RECORDS MANAGEMENT SYSTEM (EDRMS) FOR THE FREE STATE DEVELOPMENT CORPORATION

1. INVITATION TO BID

The Free State Development Corporation (FDC) hereby invites suitably qualified and experienced service providers to submit proposals for the **supply and installation of an Electronic Document and Records Management System (EDRMS)** in compliance with applicable South African legislation and records management standards.

2. BACKGROUND

The Free State Development Corporation currently manages corporate records across a combination of paper-based filing systems, shared network drives, Microsoft 365 repositories, shared department drives and other information repositories. This fragmented records environment presents challenges relating to information retrieval, version control, records governance, audit readiness, records retention, disaster recovery, and compliance with legislative requirements.

To address these challenges, the Corporation is undertaking a programme of digital transformation aimed at improving operational efficiency, strengthening governance, enhancing service delivery, and modernising information management practices. As part of this initiative, the FDC intends to implement an enterprise Electronic Document and Records Management System (EDRMS) that will serve as the official repository for all corporate records throughout their lifecycle.

The proposed solution must provide secure document and records management capabilities, support collaboration across business units, facilitate electronic workflows, improve accessibility of information, and ensure compliance with applicable records management legislation, information security standards, and recognised governance best practices.

The solution shall comply with all applicable legislation and recognised standards, including, but not limited to:

- National Archives and Records Service of South Africa Act, 1996 (Act No. 43 of 1996)
- Protection of Personal Information Act, 2013 (POPIA)
- Promotion of Access to Information Act, 2000 (PAIA)
- Minimum Information Security Standards (MISS)
- ISO 15489 – Records Management
- ISO/IEC 27001 – Information Security Management Systems
- Any other applicable legislation, standards, directives, or records management requirements issued by the National Archives and Records Service of South Africa.

3. OBJECTIVES

The objectives of this project are to:

- 3.1. Implement a secure, scalable, resilient, and standards-compliant Electronic . Document and Records Management System (EDRMS).
- 3.2. Establish a single authoritative repository for all official corporate records.
- 3.3. Improve records accessibility, information governance, accountability, and organizational audit readiness.
- 3.4. Automate records lifecycle management, including retention scheduling, archival, legal hold, and lawful disposal of records.
- 3.5. Enhance document retrieval through advanced metadata, indexing, and enterprise s
- 3.6. Enable secure collaboration and controlled information sharing across business units.
- 3.7. Strengthen records integrity through comprehensive version control and audit trail functionality.
- 3.8. Support the Corporation's digital transformation strategy by reducing reliance on paper-based processes and enabling efficient electronic business operations.
- 3.9. Strengthen business continuity by protecting corporate records through appropriate backup, disaster recovery, and business continuity mechanisms.
- 3.10. Ensure compliance with applicable legislative, regulatory, and organisational records management requirements.
- 3.11. Support integration with existing and future enterprise business systems.

4. SCOPE OF WORK

4.1 Electronic Document and Records Management System (EDRMS)

The successful bidder shall supply, configure, implement, test, commission, and support a fully functional enterprise Electronic Document and Record Management System (ERDMS) that meets the functional, technical, security, legislative and operational requirements of the Free State Development Corporation. The solution shall provide comprehensive records lifecycle management capabilities for both electronic and physical records and support future organizational growth and digital transformation initiatives.

4.2 Data Migration and Digitisation

The service provider must:

- 4.2.1 Assess existing manual and electronic records
- 4.2.2 Cleanse, index, and classify legacy data
- 4.2.3 Digitise priority physical records
- 4.2.4 Ensure data integrity, validation, and auditability

4.3 Training and Change Management

The bidder must provide:

- 4.3.1 End-user and administrator training sessions
- 4.3.2 Training manuals, SOPs, and user guides
- 4.3.3 Awareness and change management workshops
- 4.3.4 Post-implementation user support

4.4 Support and Maintenance

Provide:

- 4.4.1 Minimum 12-month maintenance and support
- 4.4.2 Helpdesk and technical support services
- 4.4.3 System updates, upgrades, and security patches
- 4.4.4 Defined Service Level Agreement (SLA)

5. PROJECT DELIVERABLES

- 5.1** Implemented and configured Document and Records Management System
- 5.2** Migrated and digitised records repository
- 5.3** Training completion reports and materials
- 5.4** Support and maintenance SLA documentation
- 5.5** Final project close-out report

6. PROJECT DURATION

The project is expected to be completed within six (6) to twelve (12) months from the date of appointment.

7. MINIMUM BIDDER REQUIREMENTS

Bidders must demonstrate:

- 7.1** Proven experience in development and implementation of an EDRMS

- 7.2** Knowledge of National Archives compliance processes
- 7.3** Availability of qualified records management specialists
- 7.4** Adequate technical implementation capacity

8. EVALUATION

Proposals for the appointment of the service provider will be evaluated in Three (3) phases. The first phase will be compliance requirements, the second phase will be functionality, the third phase will be price and specific goals in accordance with the **Preferential Procurement Regulations 2022**.

8.1. Phase One (1): Compliance

Returnable documents to be submitted:

- 8.1.1. Proof of registration on Central Supplier Database System (CSD)
- 8.1.2. Valid Tax Clearance Certificate (Refer to Page 4 of the Bid document: Tax Clearance Certificate Requirements) or Tax PIN;
- 8.1.3. SANAS accredited BBBEE Certificate/Sworn Affidavit of Measured Entity (if no certificate is received, a score of zero will be allocated for evaluation purposes);
- 8.1.4. SBD 1: Invitation to Bid fully completed and appropriately signed;
- 8.1.5. SBD 3.3: Pricing Schedule fully completed and appropriately signed;
- 8.1.6. SBD 4: Declaration of Interests Form fully completed and appropriately signed;
- 8.1.7. SBD 6.1: Preference Points Claim Form, fully completed and appropriately signed;

NB: Service providers who fail to submit the above documents will be disqualified and will not be evaluated further, however, to the extent that the applicable laws and regulations permit, Service providers will be contacted to address outstanding information within a reasonable timeline as determined by the FDC. The request for such outstanding information will not be information that affects the substance of the proposal or that gives a Service provider unfair advantage to the other bidders.

9. Functionality

NB: The minimum qualifying score for functionality is **70 points out of 100**. All bids that fail to achieve the minimum qualifying score on functionality shall not be considered for further evaluation.

Criteria	Weight
1. Company Experience The bidder must demonstrate proven experience in the successful implementation of Electronic Document and Records Management Systems (EDRMS) or similar enterprise information management solutions of comparable scope and complexity. Bidders must submit contactable relevant reference letters on the client's official letterhead, signed and dated, for projects completed within the last five (5) years. Each relevant reference letter must contain, at a minimum, the following information: • Client name; • Project title; • Brief description of the scope of work performed; • Confirmation that the project involved the implementation of an Electronic Document and Records Management System (EDRMS) or a similar enterprise records management solution; • Project completion date; • Name, designation, telephone number and email address of the client contact person; and • Confirmation of the client's level of satisfaction with the services rendered. a) Only relevant reference letters meeting all of the above requirements will be considered for evaluation. b) The reference projects must be comparable in nature, scope and complexity to the requirements of these Terms of Reference. • Five (5) or more compliant reference letters – 25 points • Four (4) compliant reference letters – 20 points • Three (3) compliant reference letters – 15 points • Two (2) compliant reference letters – 10 points • One (1) compliant reference letter – 5 points	25 points

• No compliant reference letter submitted – 0 points NB: • Only projects completed within the last five (5) years will be considered. • FDC reserves the right to verify any reference submitted. • Reference letters that do not contain the minimum information specified above, are unsigned, undated, or are not relevant to the scope of this project will not be considered for scoring.	
2. Technical experience The bidder must demonstrate that it has the necessary technical expertise and implementation capacity to successfully deliver the Electronic Document and Records Management System (EDRMS). The bidder shall submit the Curriculum Vitae (CVs), certified copies of relevant qualifications, and a proposed project organisational structure identifying all key resources assigned to this project. i. Project Manager / Team Leader (20 points) • Five (5) or more years' relevant experience - 20 points • Four (4) years relevant experience - 16 points • Three (3) years relevant experience - 12 points • Two (2) years relevant experience - 8 points • One (1) year relevant experience - 4 points • Less than one (1) year or no relevant experience - 0 points	30 points

Relevant experience must be supported by a detailed Curriculum Vitae clearly indicating projects undertaken, roles performed, project duration and responsibilities. ii. Project Team and Organisational Structure (10 points) The bidder must submit a clear project organisational structure identifying all proposed project resources and their respective roles and responsibilities for the implementation of the EDRMS. Points shall be allocated as follows: • Comprehensive organisational structure submitted, clearly identifying all proposed project resources, reporting lines, roles and responsibilities, supported by relevant CVs and qualifications – 10 points) • Organisational structure submitted without any of the following, <i>proposed project resources, reporting lines, roles and responsibilities, supported by relevant CVs and qualifications</i> – 5 points) • No organisational structure submitted or insufficient information provided – (0 points) NB: • The Curriculum Vitae submitted for the Project Manager/Team Leader must correspond with the individual identified on the project organisational structure. • All qualifications submitted must be relevant to the scope of this project. • FDC reserves the right to verify qualifications, certifications and experience claimed by the bidder. • Only experience directly related to the implementation of Electronic Document and Records Management Systems (EDRMS) or comparable enterprise information management solutions will be considered for scoring	
Detailed Proposal The bidder shall submit a comprehensive technical proposal demonstrating its understanding of the project requirements and	35

proposed approach to the successful implementation of the Electronic Document and Records Management System (EDRMS). The proposal shall, at a minimum, include the following: • Implementation methodology; • Detailed project plan and implementation schedule; • Communication and stakeholder engagement plan; • Risk management methodology; • Change management approach; • Training and knowledge transfer approach; • Support and maintenance approach; • Quality assurance and testing methodology.								
The proposal will be evaluated as follows: <table><tr><th>Evaluation</th></tr><tr><td>Proposal comprehensively addresses all mandatory requirements contained in these Terms of Reference, provides a clear implementation methodology, realistic project plan, comprehensive risk mitigation measures, communication strategy, change management approach, training plan and post-implementation support model • Demonstrates excellent understanding of the project. </td></tr><tr><td>Proposal addresses all requirements with minor omissions. • Demonstrates a good understanding of the project. </td></tr><tr><td>Proposal addresses most requirements but contains noticeable gaps or lacks sufficient detail in certain areas. • Demonstrates an adequate understanding of the project. </td></tr><tr><td>Proposal addresses some requirements only and lacks sufficient detail to demonstrate the bidder's capability.</td></tr><tr><td>Proposal provides very limited information and demonstrates little understanding of the project requirements.</td></tr><tr><td>Proposal not submitted or fails to address the required elements.</td></tr></table>	Evaluation	Proposal comprehensively addresses all mandatory requirements contained in these Terms of Reference, provides a clear implementation methodology, realistic project plan, comprehensive risk mitigation measures, communication strategy, change management approach, training plan and post-implementation support model • Demonstrates excellent understanding of the project.	Proposal addresses all requirements with minor omissions. • Demonstrates a good understanding of the project.	Proposal addresses most requirements but contains noticeable gaps or lacks sufficient detail in certain areas. • Demonstrates an adequate understanding of the project.	Proposal addresses some requirements only and lacks sufficient detail to demonstrate the bidder's capability.	Proposal provides very limited information and demonstrates little understanding of the project requirements.	Proposal not submitted or fails to address the required elements.	
Evaluation								
Proposal comprehensively addresses all mandatory requirements contained in these Terms of Reference, provides a clear implementation methodology, realistic project plan, comprehensive risk mitigation measures, communication strategy, change management approach, training plan and post-implementation support model • Demonstrates excellent understanding of the project.								
Proposal addresses all requirements with minor omissions. • Demonstrates a good understanding of the project.								
Proposal addresses most requirements but contains noticeable gaps or lacks sufficient detail in certain areas. • Demonstrates an adequate understanding of the project.								
Proposal addresses some requirements only and lacks sufficient detail to demonstrate the bidder's capability.								
Proposal provides very limited information and demonstrates little understanding of the project requirements.								
Proposal not submitted or fails to address the required elements.								
Locality - Free State based Company (attach Valid lease agreement or municipal account not older than 3 months)	10 points							
Total	100							

NB:

- The FDC reserves the right to invite shortlisted bidders to conduct a live demonstration of the proposed Electronic Document and Records Management System (EDRMS). The demonstration shall be based on scenarios provided by FDC and must demonstrate the key functional requirements contained in these Terms of Reference.

10. GOVERNANCE AND REPORTING

The appointed service provider will report to the ICT Manager and must provide:

- 10.1** Monthly progress reports
- 10.2** Risk and issue management logs
- 10.3** Milestone deliverable sign-offs

11. CONFIDENTIALITY AND INFORMATION SECURITY

All information accessed during the project shall remain strictly confidential and must be handled in compliance with POPIA and FDC information security policies.

Price Declaration Form

Dear Sir/ Madam

Having carefully read and examined the Request for Bid (RFB) document, terms of reference, requirements and all other documents relating to this bid, we hereby offer to provide the services for the Appointment of a service provider for the Supply and Installation of an Electronic Document and Records Management System (EDRMS) for the Free State Development Corporation for the total amount of:

R.....

.....(including VAT) In words

.....(including VAT)

We confirm that the above price includes all activities, deliverables, project management, consulting services and any other costs associated with the successful execution of the project as specified in the Terms of reference. We further confirm that FDC shall not incur any additional costs beyond the amount stated above in connection with the provision of these services.

SIGNED _____ DATE _____

(Print name of signatory)

Designation

FOR AND ON BEHALF

COMPANY

OF:

NAME

Tel No

Fax No

Cell No

SBD 3.1

**PRICING SCHEDULE – FIRM PRICES
(PURCHASES)**

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

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

Name of bidder.....	Bid number.....
Closing Time 12:00	Closing date: 11 August 2026

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

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

-
- Required by:
 - At:
.....
 - Brand and model
 - Country of origin
 - Does the offer comply with the specification(s)? *YES/NO
 - If not to specification, indicate deviation(s)
 - Period required for delivery
*Delivery: Firm/not firm
 - Delivery basis

Note: All delivery costs must be included in the bid price, for delivery at the prescribed destination.

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

*Delete if not applicable

SBD 4

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

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

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

2. Bidder's declaration

- 2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise, employed by the state? **YES/NO**
- 2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of State institution

- 2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**
- 2.2.1 If so, furnish particulars:
.....
.....
- 2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**
- 2.3.1 If so, furnish particulars:
.....
.....

3 DECLARATION

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

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

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

- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.
I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

² Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

SBD 6.1

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

This preference form must form part of all 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**

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

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

Where

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

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

3.2.1. POINTS AWARDED FOR PRICE

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

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

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 (80/20 system)	Number of points claimed (80/20 system) (To be completed by the tenderer)	Supporting documents to be submitted with the tender documents
Price	80		
100% Black Women Ownership	10		SANAS accredited BBBEE Certificate/Sworn Affidavit
100% Black Youth Ownership	10		SANAS accredited BBBEE Certificate/Sworn Affidavit
Total 100 Points	100		

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:

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