

P.O. Box 3209,
Houghton, 2041
Block A,
Riviera Office Park,
6-10 Riviera Road,
Riviera



REQUEST FOR PROPOSALS

DEVELOPMENT AND IMPLEMENTATION OF A SPATIAL TRANSFORMATION IMPACT MOBILE APPLICATION

HDA/JHB/2019/020

**PROPOSALS TO BE SUBMITTED BY NOT LATER THAN
11H00 ON 10 MARCH 2020**

1. Introduction

The Housing Development Agency (HDA) is a national public development agency which promotes sustainable communities by making well located and appropriately planned land available for the development of human settlement. As its primary activity, the HDA assembles state, private and communal land and releases it for development. In addition HDA provides project delivery support services to organs of state at local, provincial and national level. The key objective of the Monitoring and Evaluation, Knowledge Management and Research Planning Unit is (according to the HDA Act, 2008), 'to monitor the provision of all infrastructure required for housing development'. Central to achieving this objective is to monitor the impact of spatial transformation as per the National Development Plan.

2. Background

One of the priorities of the Medium-Term Strategic Framework (MTSF) 2019 -2024 is to ensure the achievement of spatial transformation through multi-programme integration in 94 priority development areas. In view of achieving this target, the Monitoring & Evaluation, Knowledge Management and Research Planning Unit seeks to establish a digital capability to evaluate spatial transformation via a Spatial Transformation Impact Mobile Application (STIA). The STIA will be initially piloted in selected integrated and inclusive communities. The objectives of the STIA are

- a) To have an interactive engagement with the beneficiaries of housing developments and gauge the pulse of the community.
- b) To improve the citizen experience and facilitate two-way communication between citizens and the human settlements sector

The HDA is seeking the services of a consultancy team with proven website and mobile application development experience to design, develop, implement and provide long-term maintenance of a mobile application for citizen engagement. The team will work under the supervision of the Senior Manager: Monitoring & Evaluation, Knowledge Management and Research Planning. The Senior Manager will be seen as the product owner.

3. Scope of work

The main duties and responsibilities of the service provider are:

3.1. Assist in documenting hardware and software requirements (HDA to supply the required Hardware)

3.2. Develop and implement a commercially stable, dynamically scalable mobile capturing application

3.2.1. Development methodology

3.2.1.1. Development of the software must follow an agile methodology with frequent feedback given to the stakeholders

3.2.1.2. The agile methodology must support a phased development approach, where the success of a phase will determine the appetite and feasibility for further phases that will add further features and capabilities to the mobile application. Budget will be allocated per phase with a defined backlog as set and negotiated between the project team and the product owner. A phase is not synonymous to a sprint: a phase will be comprised of multiple sprints.

3.2.1.3. Continuous feedback with the product owner must be implemented via ceremonies such as sprint reviews, demos and retrospectives.

3.2.2. Architecture

3.2.2.1. The architecture of the application must be based on a two-tier architecture, where presentation logic is in the mobile application, and the business logic is contained in a backend server on the cloud. The backend functionality may also be implemented using serverless cloud technology.

3.2.2.2. Cloud-hosted services will need to be deployed in a cloud account owned by the HDA. This includes both pre-production and production workloads. The service provider may use their own cloud account for their own development purposes, but that will be at the service provider's expense.

3.2.2.3. For the purposes of quality (QA) testing and production, the HDA cloud account will need to be used.

3.2.3. Front end GUI Requirements

3.2.3.1. Security

- Fully secured and access-controlled to authorised users (HDA controlled and managed)

- Registration of users must not be open-ended: user's details will need to be checked against a database of beneficiaries, or follow a manual authorisation process actioned by a support team
 - Data must be protected and encrypted
 - Data access control must consider who can edit and see captured data and reports
 - The lifecycle and management of data stored needs to take POPI Act into account
- 3.2.3.2. User profile functionality - Provision of specific functionality based on the signed in users' roles and responsibilities
- 3.2.3.3. Multiple Platform support –Mobile/Tablet device support i.e. compatible with iOS and Android. It should be ensured that the mobile application works flawlessly across different platforms and touch screen devices (Windows and IOS)
- 3.2.3.4. Core Features
- Data Entry of the STIA (see Annexure A)
 - Geocoding using device's location-based services (e.g. GPS)
 - Receiving push notifications for targeted communication
- 3.2.3.5. Design of the mobile application GUI must be user tested through the use of a mobile prototyping framework
- 3.2.3.6. A mobile prototyping framework needs to be used to provide quick prototype iterations for the product owner to be able to provide quick feedback and direction to the project team
- 3.2.3.7. Design, look and feel
- The mobile application will provide clear layout and organized displays
 - Develop Resolution independent design structure: It must be ensured that the mobile application adjusts itself automatically as per the screen resolution of the Mobile i.e. 1024*768, 1200*800 etc. Resolution independent mobile application will automatically expand/compress itself as per the screen resolution and hence there should not be any vertical scroll in the mobile application structure
 - The mobile application should open and function properly with low bandwidth
 - The mobile application should be able to operate with limited functionality in an offline mode
 - The mobile application should support multi-lingual functionality

- The mobile application needs to alert the user to download the latest version, which ever available and if required prompt for compulsory upgrade.
- The mobile application should be capable of accessing mobile device features like camera, GPS, etc.

3.2.3.8. Usability

- The mobile application will provide consistent experience across all mobile platforms
- The mobile application must be easy and intuitive to learn

3.3. Data processing and analysis

- The mobile application should be able to process results and draw out analysis with corresponding bar charts, graphs, pie charts etc. clearly depicting the transformation % for Quality of Life, Quality of Place and Quality of Growth per community. This function is only available to selected users that will be given a role of "report read-only access". The registration of these selected users to access the mobile application will not follow the same process as for beneficiaries and may need to be administered by the product owner.

3.4. Generate reports

- Data captured can be exported and sent as reports
- Reports should include maps, tables, graphs etc.
- Save and export to pdf functionality whilst retaining all graphic elements and design layouts
- All data to be exported to a spreadsheet / database (data must be usable for pivot tables)

3.5. Cloud Storage

- Data captured must eventually be synchronised to Cloud storage so that it may then be used for backend processing
- Data retention policies will require a backup solution to on-premise hardware
- The design of the data storage needs to take into account the POPI Act, with specific attention given to what data can be stored outside South African borders, and how to achieve the functional requirements whilst still remaining within the conditions laid out in the POPI Act.

3.6. Training

- Develop a user manual for the users that will be administering access to the mobile application and for the users who will be given the 'report read-only access' role.
- Provide at least two training sessions to selected HDA personnel
- Provide cloud administration handover sessions and documentation for HDA staff to be able to effect system operation functions.
- Training costs should be provided per user.

3.7. Maintenance

- Maintain the mobile application for at least 12 months from the time it goes LIVE

4. Deliverables

4.1. Project plan approach should include budget plan as well as a risk and mitigation plan

4.2. Business and technical architecture documented using UML and depicting:

- Class diagrams with relationships between classes
- Sequence diagrams for all component interactions

4.3. User requirements specifications

4.4. Functional requirements specifications which must include a prototype of the mobile application depicting all UX elements

4.5. Testing and Acceptance procedure to agreed specifications with the client (including stress and penetration testing). The testing will be conducted in/with a community. The Service provider is to provide mobile devices for testing.

4.6. Demonstration of mobile application LIVE

4.7. Training Manual

4.8. Software development code, commented code, all APIs, classes, processes and procedures

4.9. Report on the implementation of mobile application

4.10. Monthly maintenance reports

4.11. Bi-weekly project status meetings and a monthly progress status report will be expected during the development period

5. Time Frame

A maximum of ten months is envisaged for delivering a fully functional Mobile application as described in the body of the report and as per deliverables.

6. Acceptable Practices

- The service provider will provide a project champion to minimize communication confusion and maximize effectiveness.
- The service provider will preserve the confidential information obtained and will not use the information for personal and commercial gain nor in a way that would be harmful to the HDA.
- The Service Provider must demonstrate a high degree of flexibility and must have the ability to tailor content and delivery methods to meet the specific needs of the HDA.
- The service provider must provide the HDA with a one-year warranty period, starting when the mobile application is accepted/ approved by the HDA. The service provider will warrant all work to be free of defects during the 12 months maintenance period. Any repairs or “bug fixes” required during this period will be made at no expense to the HDA by the service provider.

7. Intellectual Property Right

The entire source code developed as part of the scope of RFP is to be provided to the HDA with proper documentation describing the source code of each module/routine etc. All deliverables in the form of software, source code, documentation and other items related with the tool developed will become the sole Intellectual Proprietary item of the HDA. The design, development and implementation of the scope of the work under the RFP are the sole property of the HDA.

Note:

1. During the development phase the Mobile application need to be registered in the name of the HDA.
2. The HDA will provide all hardware requirements to host the Mobile Application – at the HDA's cost.

8. Evaluation

In order to facilitate a transparent selection process that allows equal opportunity to all production companies, the HDA has a policy for the appointment of consultants that will be adhered to. Proposals will be evaluated in terms of the prevailing supply chain policy applicable to the HDA and it should be noted that proposals will be assessed using the 80: 20 formula for Price and BEE as per the PPPFA.

8.1. The HDA needs to be satisfied, in all respects, that the organisation/individual selected has the necessary resources, qualifications and abilities for this project, and that all submissions are regarded in a fair manner in terms of evaluation criteria and process.

8.2. The assessment and evaluation of submitted proposals will undergo a process of Pre-qualification and an Evaluation Phase. The initial phase of the evaluation will be in a form of a Pre-qualification, in accordance with the PPPFA Act, Preferential Procurement Regulation which organs of state can apply in order to advance designated groups and transformation. Only tenderers who meet the Pre-qualification conditions will be considered for the next phase. i.e. Evaluation Phase. A tender that fails to meet any Pre-qualifying criteria stipulated in the tender document is an unacceptable tender. Pre-qualification conditions which an applicant must meet in order to be considered:

- **A tenderer having a stipulated minimum of level 1 to 3 B-BBEE status level.**

8.3. The general methodology of selection will be based on proposals that will first be evaluated on their technical ability to perform the task. Any proposals scoring **below 75** points noted in the table below will be disqualified for the second evaluation. The second evaluation of technically competent proposals will be evaluated against Price and B-BBEE using an 80/20 Price/B-BBEE formula.

Table 1- Functionality Criteria

No	Description	Score	0 point	20 points	30 points	40 points
1	Proposal: The mobile application developer is proficient and experienced in multi-platform mobile application development and has provided evidence.	(40)	The proposal does not include evidence of capabilities of the developer in multi-platform mobile application development.	The proposal includes evidence demonstrating the basic capabilities of the developer in multi-platform mobile application development and deployment. Inadequate formal certification is presented.	The proposal includes evidence demonstrating that the developer is proficient in multi-platform mobile application development and has provided evidence of less than 5 years' experience with formal certification.	The proposal includes evidence demonstrating that the developer is proficient in multi-platform mobile application development and has provided evidence of minimum 5 years of experience with formal certification.
No		Score	0 point	10 points	20 points	30 points
2	Mock-Up: Provide graphical mock-up of UX with home view, sample questionnaire views and setting view demonstrating navigation elements.	(30)	The proposal does not include the submission of a graphical mock-up of UX.	The submission of a graphical mock-up of UX does not include samples of all required views and elements.	The submission of a graphical mock-up of UX does include samples of all required views and elements but UX design language is unsatisfactory, nonstandard or ambiguous.	The submission of a graphical mock-up of UX does include samples of all required views and elements and UX design language is satisfactory, standard and unambiguous/clear.

No	Description	Score	0 points	5 points	7 points	10 points
3	Project Program: The mobile application developer shall include a detailed project plan with all tasks including deployment and testing and maintenance	(10)	No project plan submitted	Project plan provided does not meet project's scope/timeline.	The project plan is articulated adequately but lacks in some level of detail (e.g. project resources). It includes all activities and phases of the project and is in sync with project timelines.	The project plan is clear (displays milestones and project resources) and addresses all project requirements. It includes all activities and phases and is in sync with project timelines
No	Description	Score	0 points	5 points	7 points	10 points
4	Experience in publishing and maintaining mobile applications in the various application stores for Android and iOS	(10)	No information provided	3 years' experience and provided evidence	4-5 years' experience and provided evidence	>5 years' experience and provided evidence
No	Description	Score	0 points	5 point	7 points	10 points
5	Client testimonials	(10)	No information provided	2 Verified testimonials from reputable, high volume and high-profile mobile applications with similar functionality to that specified in section 3 Client testimonial must be:	5 Verified testimonials from reputable, high volume and high-profile mobile applications with similar functionality to that specified in section 3	>5 Verified testimonials from reputable, high volume and high-profile mobile applications with similar functionality to that specified in section 3

			<ul style="list-style-type: none"> • On client letterhead, Letter head must have contactable references (telephone, email address and contract person) • Letter to be signed off or stamped 	<p>Client testimonial must be:</p> <ul style="list-style-type: none"> • On client letterhead, Letter head must have contactable references (telephone, email address and contract person) • Letter to be signed off or stamped 	<p>Client testimonial must be:</p> <ul style="list-style-type: none"> • On client letterhead, Letter head must have contactable references (telephone, email address and contract person) • Letter to be signed off or stamped
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The following criteria will be used for point's allocation for price and B-BBEE compliance on an 80/20-point system: -

Table 2 – Price and B-BBEE

CRITERIA	SUB-CRITERIA	WEIGHTING/ POINTS
Price	Detailed budget breakdown	80
B-BBEE Status Level Verification Certificate from accredited verification agencies	B-BBEE Level Contributor	20
TOTAL		100

9. General

9.1. Below are compulsory requirements for this service

Note: Failure to comply with the following requirement will automatically disqualifies the bidder.

9.1.1. It is important to note that the successful bidder will work under the supervision of an HDA representative, abide by HDA's Code of Conduct, and other organisational guidelines.

9.1.2. Kindly complete and submit the HDA Supplier Registration form if not already on our database and submit together with:

- CSD registration report (Registration with the National Treasury Central Supplier Database, if not yet registered use the following link to register : <https://secure.csd.gov.za>.)
- SBD Forms (SBD4, SBD6.1, SBD8 and SBD9) obtainable from HDA Website: www.thehda.co.za/procurement. Under compliance checklist.
- Valid and Original or Certified B-BBEE Status Level Verification Certificates issued by the following agencies SANAS, IRBA or CCA.
- Price proposals on all work to be done.

9.2. Further information regarding technical matters can be sent Ms. Karishma Busgeeth via email to: Karishma.Busgeeth@thehda.co.za or at tel: 011 544 1000, and

9.3. Further information regarding supply chain matters and queries can be sent to Mr. Mxolisi Zondo via email to: Mxolisi.Zondo@thehda.co.za or at tel: 011 544 1000

10. Terms and Conditions

10.1. HDA undertakes to pay in full within thirty (30) days, all valid claims for work done to its satisfaction upon presentation of a substantiated claim/invoice.

10.2. No payment will be made where there is an outstanding information/work by the service provider/s.

11. Submission of Proposal

Proposal should be submitted clearly marked **"THE APPOINTMENT OF A SERVICE PROVIDER FOR THE DEVELOPMENT AND IMPLEMENTATION OF A SPATIAL TRANSFORMATION IMPACT APP ON A MOBILE PLATFORM"** and deposited in a tender box on or before the **10 MARCH 2020**, not later than **11h00** to the following address:

The Procurement Officer

The Housing Development Agency,

Block A, 6-10 Riviera Road, Killarney, 2193,

Tel: 011 544 1000

The selection of the qualifying proposal will be at the HDA's sole discretion. The HDA does not bind itself to accept any particular bid/proposal, and the HDA reserves the right not to appoint the consultant.

**Annexure A:
SPATIAL TRANSFORMATION IMPACT MOBILE APPLICATION: TAKING IT BACK TO THE COMMUNITY**

Screen 1

Gender:

Age:

ID:

Race:

Employment Status:

Grants Benefits:

- a) Child support grant
- b) Older person's grant
- c) Disability grant
- d) Grant-in-aid
- e) Care dependency grant
- f) War veteran's grant
- g) Foster child grant

Type of house:

- a) RDP
- b) FLISP
- c) Bonded
- d) Rental Housing
- e) Rent-to-buy
- f) Free Hold
- g) Sectional title

Number of years in current house:

Previous home address:

QUALITY OF PLACE	QUALITY OF LIFE	QUALITY OF GROWTH
<p>1. What attracted you to this place?</p> <ul style="list-style-type: none"> a) It is close to work b) It is reasonably priced c) It has a sense of community and belonging d) It has access to basic services, transport, churches, hospitals 	<p>1. How have your lives changed from the first time you moved here up to now?</p> <ul style="list-style-type: none"> a) You worry more and have more stress b) You worry less and sleep better c) You are proud as an owner and experience respect from friends and families d) You have more privacy 	<p>1. Impact of house on your employment and income</p> <ul style="list-style-type: none"> a) You started a new business b) You experienced business growth c) You are closer to your work and saving more
<p>2. Do you trust the people and feel safe in the community?</p> <ul style="list-style-type: none"> a) Yes b) No c) If no, why not <ul style="list-style-type: none"> i. People keep to themselves ii. Crime iii. Too much traffic 	<p>2. Impact of house on your health</p> <ul style="list-style-type: none"> a) Your health has improved due to better healthcare and cleaner environment b) Your health has deteriorated due to poorer healthcare and dumping c) No change 	<p>2. Have you made any changes to the house since moving here?</p> <ul style="list-style-type: none"> a) No b) Yes c) If Yes, how did you pay for the changes? <ul style="list-style-type: none"> i. You got a loan ii. You used your savings / stokvel iii. You obtain a credit at material supplier iv. Your landlord paid for it d) How did you make the changes? <ul style="list-style-type: none"> v. You did it yourself vi. You employ a contractor vii. You ask a friend

<p>3. Are you happy with the designs of your house?</p> <p>a) Yes b) No c) If no, why not</p> <p>i. Poor design ii. Poor quality iii. Too small iv. Too many stairs</p>	<p>3. Impact of house on your children's school performance</p> <p>a) You are closer to good school and your children are performing better b) You are further from good school c) No change</p>	<p>3. What are your future plans for your house? Say the next 5 years</p> <p>a) You will rent it out b) You will extend c) You will sell and buy elsewhere d) You will rent elsewhere e) You will move out</p>
<p>4. Impact of house on access to social and commercial amenities?</p> <p>a) You are closer to transport modes b) You are closer to shops c) You are closer to friends and families d) You are closer to churches e) You are closer to recreational facilities</p>	<p>4. Impact of house on your security and safety?</p> <p>a) You are exposed to more crime b) You are exposed to less crime</p>	<p>4. Do you pay rates to the municipality?</p> <p>a) No b) Yes c) If no, how much can you afford to pay per month?</p> <p>i. R50 ii. R100 iii. R150 iv. R200</p>
<p>5. What will happen to the house when you grow old and die?</p> <p>a) You will retire in this house b) Your children will inherit this house c) The house will be sold as per your will</p>		



SBD1

**PART A
INVITATION TO BID**

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (THE HOUSING DEVELOPMENT AGENCY (HDA))					
BID NUMBER:	HDA/JHB/2019/020	CLOSING DATE:	10 MARCH 2020	CLOSING TIME:	11h:00
DESCRIPTION	THE APPOINTMENT OF A SERVICE PROVIDER FOR THE DEVELOPMENT AND IMPLEMENTATION OF A SPATIAL TRANSFORMATION IMPACT APP ON A MOBILE PLATFORM				
THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).					

BID RESPONSE DOCUMENTS MAY BE DEPOSITED **IN THE BID BOX**
SITUATED AT (STREET ADDRESS)

THE HOUSING DEVELOPMENT AGENCY (HDA)
BLOCK A, RIVIERA OFFICE PARK
6-10 RIVIERA ROAD
KILLARNEY, JOHANNESBURG

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			

	TCS PIN:		OR	CSD No:	
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE [TICK APPLICABLE BOX]	<input type="checkbox"/> Yes		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	<input type="checkbox"/> Yes	
	<input type="checkbox"/> No			<input type="checkbox"/> No	

IF YES, WHO WAS THE CERTIFICATE ISSUED BY?					
AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA) AND NAME THE APPLICABLE IN THE TICK BOX	<input type="checkbox"/>	AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA)			
	<input type="checkbox"/>	A VERIFICATION AGENCY ACCREDITED BY THE SOUTH AFRICAN ACCREDITATION SYSTEM (SANAS)			
	<input type="checkbox"/>	A REGISTERED AUDITOR			
		NAME:			

[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/SWORN AFFIDAVIT(FOR EMEs & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]

ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
	[IF YES ENCLOSE PROOF]			[IF YES ANSWER PART B:3 BELOW]	

SIGNATURE OF BIDDER	DATE	
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CAPACITY UNDER WHICH THIS BID IS SIGNED (Attach proof of authority to sign this bid; e.g. resolution of directors, etc.)			
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TOTAL NUMBER OF ITEMS OFFERED		TOTAL BID PRICE (ALL INCLUSIVE)	
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BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO:		TECHNICAL INFORMATION MAY BE DIRECTED TO:	
DEPARTMENT/ PUBLIC ENTITY	SCM	CONTACT PERSON	Karishma Busgeeth
CONTACT PERSON	Mxolisi Zondo	TELEPHONE NUMBER	011-544-1000
TELEPHONE NUMBER	011-544-1000	FACSIMILE NUMBER	011-544-1006/7



SBD1

FACSIMILE NUMBER	011-544-1006/7	E-MAIL ADDRESS	Karishma.Busgeeth@thehda.co.za
E-MAIL ADDRESS	Mxolisi.Zondo@thehda.co.za		



**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. THE BID BOX IS GENERALLY OPEN DURING OFFICE HOURS, MONDAY TO FRIDAY, FROM 08H00 TO 16H00.
1.2.	ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED—(NOT TO BE RE-TYPED) OR ONLINE
1.3.	BIDDERS MUST REGISTER ON THE CENTRAL SUPPLIER DATABASE (CSD) TO UPLOAD MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS; AND BANKING INFORMATION FOR VERIFICATION PURPOSES). B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.
1.4.	WHERE A BIDDER IS NOT REGISTERED ON THE CSD, MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS MAY NOT BE SUBMITTED WITH THE BID DOCUMENTATION. B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.
1.5.	THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER LEGISLATION OR SPECIAL CONDITIONS OF CONTRACT.
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 VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.
2.3	APPLICATION FOR TAX COMPLIANCE STATUS (TCS) OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE WWW.SARS.GOV.ZA.
2.4	BIDDERS MAY ALSO SUBMIT A PRINTED TCS TOGETHER WITH THE BID.
2.5	IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE PROOF OF TCS / PIN / CSD NUMBER.
2.6	WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS	
3.1.	IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? <input type="checkbox"/> YES <input type="checkbox"/> NO
3.2.	DOES THE BIDDER HAVE A BRANCH IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO
3.3.	DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO
3.4.	DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO
IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN, IT IS NOT A REQUIREMENT TO OBTAIN A TAX COMPLIANCE STATUS / TAX COMPLIANCE SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 ABOVE.	

NB: FAILURE TO PROVIDE ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

DECLARATION OF INTEREST

1. Any legal person, including persons employed by the state¹, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes a price quotation, advertised competitive bid, limited bid or proposal). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where-

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

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

2.1 Full Name of bidder or his or her representative:

2.2 Identity Number:

2.3 Position occupied in the Company (director, trustee, shareholder²):

2.4 Company Registration Number:

2.5 Tax Reference Number:

2.6 VAT Registration Number:

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

¹"State" means –

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

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

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

2.7.1 If so, furnish the following particulars:

Name of person / director / trustee / shareholder/ member:
Name of state institution at which you or the person connected to the bidder is employed :
Position occupied in the state institution:

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

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

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

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

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

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

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

2.8.1 If so, furnish particulars:

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

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

4 DECLARATION

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

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

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

May 2011

**PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL
PROCUREMENT REGULATIONS 2017**

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

NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF B-BBEE, AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017.

1. GENERAL CONDITIONS

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

- the 80/20 system for requirements with a Rand value of up to 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

- a) The value of this bid is estimated to ~~exceed~~/~~not exceed~~ R50 000 000 (all applicable taxes included) and therefore the preference point system shall be applicable; or
- b) Either the 80/20 or 90/10 preference point system will be applicable to this tender (*delete whichever is not applicable for this tender*).

1.3 Points for this bid shall be awarded for:

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

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

	POINTS
PRICE
B-BBEE STATUS LEVEL OF CONTRIBUTOR
Total points for Price and B-BBEE must not exceed	100

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

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

B-BBEE Status Level of Contributor	Number of points (90/10 system)	Number of points (80/20 system)
1	10	20
2	9	18
3	6	14
4	5	12
5	4	8
6	3	6
7	2	4
8	1	2
Non-compliant contributor	0	0

5. BID DECLARATION

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

6. B-BBEE STATUS LEVEL OF CONTRIBUTOR CLAIMED IN TERMS OF PARAGRAPHS 1.4 AND 4.1

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

(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 4.1 and must be substantiated by relevant proof of B-BBEE status level of contributor.

7. SUB-CONTRACTING

7.1 Will any portion of the contract be sub-contracted?

(Tick applicable box)

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

7.1.1 If yes, indicate:

i) What percentage of the contract will be subcontracted.....%

ii) The name of the sub-contractor.....

iii) The B-BBEE status level of the sub-contractor.....

iv) Whether the sub-contractor is an EME or QSE

(Tick applicable box)

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

v) Specify, by ticking the appropriate box, if subcontracting with an enterprise in terms of Preferential Procurement Regulations,2017:

Designated Group: An EME or QSE which is at least 51% owned by:	EME √	QSE √
Black people	<input type="checkbox"/>	<input type="checkbox"/>
Black people who are youth	<input type="checkbox"/>	<input type="checkbox"/>
Black people who are women	<input type="checkbox"/>	<input type="checkbox"/>

Black people with disabilities		
Black people living in rural or underdeveloped areas or townships		
Cooperative owned by black people		
Black people who are military veterans		
OR		
Any EME		
Any QSE		

8. DECLARATION WITH REGARD TO COMPANY/FIRM

8.1 Name of company/firm:.....

8.2 VAT registration number:.....

8.3 Company registration number:.....

8.4 TYPE OF COMPANY/ FIRM

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

[TICK APPLICABLE BOX]

8.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

.....

8.6 COMPANY CLASSIFICATION

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

[TICK APPLICABLE BOX]

8.7 Total number of years the company/firm has been in business:.....

8.8 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBE status level of contributor indicated in paragraphs 1.4 and 6.1 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I / we acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points 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 6.1, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;
- iv) If the B-BBEE status level of contributor has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –
 - (a) disqualify the person from the bidding process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person’s conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution.

<p>WITNESSES</p> <p>1.</p> <p>2.</p>	<p>..... SIGNATURE(S) OF BIDDERS(S)</p> <p>DATE:</p> <p>ADDRESS</p> <p>.....</p> <p>.....</p>
---	--

DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

1. This Standard Bidding Document must form part of all bids invited.
2. It serves as a declaration to be used by institutions in ensuring that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system.
3. The bid of any bidder may be disregarded if that bidder, or any of its directors have-
 - a. abused the institution's supply chain management system;
 - b. committed fraud or any other improper conduct in relation to such system; or
 - c. failed to perform on any previous contract.
4. **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid:**

Item	Question	Yes	No
4.1	<p>Is the bidder or any of its directors listed on the National Treasury's Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector?</p> <p>(Companies or persons who are listed on this Database were informed in writing of this restriction by the Accounting Officer/ Authority of the institution that imposed the restriction after the <i>audi alteram partem</i> rule was applied).</p> <p>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.</p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.1.1	If so, furnish particulars:		
4.2	<p>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)?</p> <p>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.</p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.2.1	If so, furnish particulars:		
4.3	Was the bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five years?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Item	Question	Yes	No
4.3.1	If so, furnish particulars:		
4.4	Was any contract between the bidder and any organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.4.1	If so, furnish particulars:		

CERTIFICATION

I, THE UNDERSIGNED (FULL NAME)
 CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM IS
 TRUE AND CORRECT.

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

.....
 SIGNATURE

.....
 DATE

.....
 POSITION

.....
 NAME OF BIDDER

CERTIFICATE OF INDEPENDENT BID DETERMINATION

1. This Standard Bidding Document (SBD) must form part of all bids¹ invited.
2. Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by, firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging)². Collusive bidding is a *pe se* prohibition meaning that it cannot be justified under any grounds.
3. Treasury Regulation 16A9 prescribes that accounting officers and accounting authorities must take all reasonable steps to prevent abuse of the supply chain management system and authorizes accounting officers and accounting authorities to:
 - a. disregard the bid of any bidder if that bidder, or any of its directors have abused the institution's supply chain management system and or committed fraud or any other improper conduct in relation to such system.
 - b. cancel a contract awarded to a supplier of goods and services if the supplier committed any corrupt or fraudulent act during the bidding process or the execution of that contract.
4. This SBD serves as a certificate of declaration that would be used by institutions to ensure that, when bids are considered, reasonable steps are taken to prevent any form of bid-rigging.
5. In order to give effect to the above, the attached Certificate of Bid Determination (SBD 9) must be completed and submitted with the bid:

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

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

CERTIFICATE OF INDEPENDENT BID DETERMINATION

I, the undersigned, in submitting the accompanying bid:

(Bid Number and Description)

in response to the invitation for the bid made by:

(Name of Institution)

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

I certify, on behalf of _____ that:
(Name of Bidder)

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign the bid, on behalf of the bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:
 - (a) has been requested to submit a bid in response to this bid invitation;
 - (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
 - (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder
6. The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However communication between partners in a joint venture or consortium³ will not be construed as collusive bidding.

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.

7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
- (a) prices;
 - (b) geographical area where product or service will be rendered (market allocation);
 - (c) methods, factors or formulas used to calculate prices;
 - (d) the intention or decision to submit or not to submit, a bid;
 - (e) the submission of a bid which does not meet the specifications and conditions of the bid; or
 - (f) bidding with the intention not to win the bid.
8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.
9. The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
10. I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No. 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No. 12 of 2004 or any other applicable legislation.

.....
Signature

.....
Date

.....
Position

.....
Name of Bidder