

WE DELIVER AFFORDABLE AND SUSTAINABLE SOCIAL HOUSING IN JOBURG



JOHANNESBURG SOCIAL HOUSING COMPANY (SOC) Ltd

BID No RFQ/UTILITIES/001/2026

BID NAME THE APPOINTMENT OF A SERVICE TO PROVIDE FOR UTILITIES MANAGEMENT SERVICES

BID DESCRIPTION: THE APPOINTMENT OF A SERVICE TO PROVIDE FOR UTILITIES MANAGEMENT SERVICES

TOTAL BID AMOUNT (OFFER):

OFFER IN WORDS:

CLOSING DATE 11:00am, Wednesday, the 24th of June 2026

NAME OF BIDDER:

CONTACT PERSON:

STREET ADDRESS
.....

TEL: **CELL:**

FAX: **E-MAIL:**

PREPARED FOR:
JOSHCO
4th Floor
Number 61 Juta Street
Braamfontein

CHIEF EXECUTIVE OFFICER

INVITATION TO BID: REQUEST FOR PROPOSALS

JOSHCO invites all prospective service providers to submit bids in accordance with the Terms of Reference provided in this invitation.

| BID NO. | PROJECT NAME |
|------------------------------|--|
| RFQ/UTILITIES/001/2026 | THE APPOINTMENT OF A SERVICE TO PROVIDE FOR UTILITIES MANAGEMENT SERVICES |
| COMPULSORY BRIEFING MEETING: | N/A |
| BID CLOSING: | 11:00am, Wednesday, the 24th of June 2026, Bids must be delivered no later than the time and date indicated above. The delivery address is JOSHCO OFFICES, 61 Juta Street, Braamfontein, Johannesburg, Gauteng. Ground Floor Reception. |

The Bid evaluation process will be conducted in three stages as follows:

Stage 1: Administrative Compliance.

Stage 2 : Functionality Criteria

Stage 3: Preferential Procurement Policy Regulations of 2022 using the 80:20 points system, where 80 points are allocated to price and 20 points are allocated to Specific Goal Contribution

All enquiries regarding this bid must be directed **in writing** to the JOSHCO Supply Chain Department, contact person: **Thabo Mthembu**, e-mail address: thabo@joshco.co.za, Technical queries must be directed to: **Sthembele Pakade** e-mail address: sthembele@joshco.co.za

Should you not receive communication from JOSHCO within 90 days of submitting your bid; accept your submission is unsuccessful.

Supply Chain Manager
Johannesburg Social Housing Company

Date:

THE EVALUATION OF THE QUOTE WILL BE CONDUCTED IN THREE STAGES AS FOLLOWS:

| | |
|---|---|
| <p>STAGE 1: Administrative Compliance</p> | <p>Primary:</p> <p>2.1 Valid SARS Tax Clearance Certificate or confirmation of SARS pin 2.2 Up to date municipal account/statement for both the company and its active directors (not older than 3 months) in case where a bidder or the director is a lessee, a signed certified copy of a valid lease agreement must be supplied 2.3 Certified ID copies of all directors. 2.4 Completed and signed FORM OF OFFER (Cover page) 2.5 Central Supplier Database (CSD) report 2.6 In the case of a JV, an original JV Authority of Signatory, JV agreement and a Consolidated B-BBEE Certificate from an approved verification agency for the JV must be submitted. 2.7 Cancelled cheque or an original letter from Bank not older than 3 months confirming bank account details. 2.8 Proof of compliance with COIDA (certified copy of a valid letter of good standing);</p> |
| <p>STAGE 2: ❖ Functionality Criteria</p> | <p>2.1 1.1The minimum threshold for the functionality evaluation is 100 points.</p> <p>Tenderers that do not meet this minimum threshold will not be evaluated further in terms of price and the preference point system.</p> |
| <p>STAGE 3: ❖ Preferential Procurement points System</p> | <ul style="list-style-type: none"> • Bidders will be evaluated in terms of Preferential Procurement Policy Regulations of 2022 using the 80:20 points system, where by 80 points will be allocated for price and 20 points allocated for B-BBEE status level of contribution. • Specific Goal |

1. PROPRIETARY INFORMATION

JOHANNESBURG SOCIAL HOUSING COMPANY, hereafter referred to as **JOSHCO** considers this Quote and all related information, either written or verbal, which is provided to the respondent, to be proprietary to JOSHCO. It shall be kept confidential by the respondent and its officers, employees, agents and representatives. The bidders shall not disclose, publish, or advertise this specification or related information to any third party without the prior written consent of JOSHCO.

DECLARATION AND CONSENT -POPIA

COMPLIANCE WITH PROTECTION OF PERSONAL INFORMATION ACT 4 of 2013 (POPIA).

By submitting the above tender/ quotation, I / We declare and allow JOSHCO at all times to:

1. Process and conduct further processing of the personal information submitted in terms of this bid application for the purposes of conducting background, credit and any necessary checks that JOSHCO may deem necessary in considering the bidder for the tender/ quotation in accordance with the JOSHCO POPIA provisions.
2. Contact, request and obtain information from any credit provider (or potential credit provider) necessary to assess behaviour, profile, payment patterns, indebtedness, whereabouts, and creditworthiness of the company.
3. Furnish information concerning the behaviour, profile, payment patterns, indebtedness, whereabouts, and creditworthiness to any registered credit bureau or to any credit provider (or potential credit provider) seeking a trade reference regarding our dealings with the Landlord.
4. All Bidders are expected to comply with the provisions of POPIA to ensure that handling and processing personal information is in accordance with the provisions of POPIA.

2. ENQUIRIES

All communication and/or pertinent enquiries for information of any kind relative to this Bid should be channelled to:

Contact person (all technical questions should be in writing):

| | |
|----------------------------------|--|
| Name & Surname | Sthembele Pakade |
| Telephone Number (Office) | 011 406 7300 |
| Email Address | Sthembele@joshco.co.za |

Bidders may not contact any other JOSHCO employee besides contact person mentioned above on any matter pertaining to this bid from the time when bid is advertised to the time the bid is awarded.

Any effort by a bidder to influence bid evaluation, bid comparisons or bid award decisions in any manner, may result in rejection of the bid concerned.

3. BID VALIDITY PERIOD

Responses to this bid received from bidders will be valid for a period of **90 Calendar Days**, counted from the closing date of the quote.

4. INSTRUCTIONS ON SUBMISSION OF QUOTES

- 4.1.** Bidders should submit completed bid documents and returnable to **No. 61 Juta Street Ground Floor Reception Braamfontein.**
- 4.2.** Bids must be submitted in a prescribed response format herewith enclosed as 'Response Format'.
- 4.3.** The closing date, company name and the return address must also be endorsed on the envelope.
- 4.4.** If a courier service company is being used for delivery of the quote document, the quote description must be endorsed on the delivery note/courier packaging and the courier must ensure that documents are placed / deposited into the quote box. **JOSHCO** will not be held responsible for any delays where quote documents are handed to the **JOSHCO** Receptionist and/or arrives late.

- 4.5. No bids received by telegram, telex, email, facsimile or similar medium will be considered.
- 4.6. Where a quote document is not in the quote box at the time of the quote closing, such a quote document will be regarded as a late quote. **JOSHCO** reserves the right not to consider/evaluate any late quote response.
- 4.7. Amended bids may be sent in an envelope marked "Amendment to bid" and should be placed in the quote box before the closing time.

5. PREPARATION OF BID RESPONSE

- 5.1. All the documentation submitted in response to this bid must be in English.
- 5.2. The bidder is responsible for all the cost that they shall incur related to the preparation and submission of the quote document.
- 5.3. Bids submitted by bidders must be signed by a person or persons duly authorised thereto by a resolution of a Board of Directors, a copy of which Resolution, duly certified be submitted with the Quote.
- 5.4. Bidders should check the numbers of the pages to satisfy themselves that none are missing or duplicated. No liability will be accepted by **JOSHCO** in regard to anything arising from the fact that pages are missing or duplicated.
- 5.5. A valid tax clearance certificate must be included in the bid response.
- 5.6. A copy(s) of certificates from the organizations/ bodies that the bidder is affiliated to must be included in the bid response.

6. SUPPLIER PERFORMANCE MANAGEMENT

- 6.1. Supplier Performance Management is viewed by the **JOSHCO** as critical component in ensuring value for money acquisition and good supplier relations between the **JOSHCO** and all its suppliers.

7. JOSHCO'S RIGHTS

- 7.1. **JOSHCO** is entitled to amend any quote conditions, validity period, specifications, or extend the closing date of quotes before the closing date. All tenderers, will be advised in writing of such amendments in good time.

- 7.2. The **JOSHCO** reserves the right not to accept the lowest bid or any bid in part or in whole. It normally awards the contract to the bidder who proves to be fully capable of handling the contract and whose bid is technically acceptable and/or financially advantageous to the JOSHCO.
- 7.3. The **JOSHCO** reserves the right to award this quote as a whole or in part without furnishing reasons.
- 7.4. **JOSHCO** reserves the right at all material times to extend the scope of work relating to this quote to include all or some of the City of Johannesburg's requirements. Should this be the case, as a result thereof all the relevant implications will be negotiated between the **JOSHCO** and the successful bidder.

8. UNDERTAKINGS BY THE BIDDER

- 8.1. The bidder hereby offers to render all or any of the services described in the attached documents to **JOSHCO** on the terms and conditions and in accordance with the terms of reference/ specifications stipulated in this Quote documents. **(And which shall be taken as part of, and incorporated into, this Proposal.)**
- 8.2. Bids submitted by prospective bidders must be signed by a person or persons duly authorised thereto by a resolution of a Board of Directors, a copy of which Resolution, duly certified be submitted with the bid.
- 8.3. The bidder hereby agree that the offer herein shall remain binding upon him/her and receptive for acceptance by the **JOSHCO** during the validity period indicated and calculated from the **closing hour and date of the Quote**; this bid and its acceptance shall be subject to the terms and conditions contained in this quote document.
- 8.4. The bidder furthermore confirms that he/she has satisfied himself/herself as to the correctness and validity of his/her bid response that the price(s) and rate(s) quoted cover all the work/item(s) specified in the bid response documents and that the price(s) and rate(s) cover all his/her obligations under a resulting contract and that he/she accept that any mistakes regarding price(s) and calculations will be at his/her risk.
- 8.5. The bidder hereby accepts full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on him/her under this agreement as the principal(s) liable for the due fulfilment of this contract.

9. REASONS FOR DISQUALIFICATION

-
- 9.1. JOSHCO** reserves the right to disqualify any bidder which does any one or more of the following, and such disqualification may take place without prior notice to the offending bidder, however the bidder may be notified in writing of such disqualification:
- 9.1.1.** bidders who submitted incomplete information and documentation according to the requirements of this bid document;
 - 9.1.2.** bidders who submitted information that is fraudulent, factually untrue or inaccurate information;
 - 9.1.3.** bidders who received information not available to other vendors through fraudulent means; and/or; other non-prescribed means;
 - 9.1.4.** Bidders who do not comply with compulsory requirements as stipulated in this bid document.

10. EVALUATION CRITERIA AND WEIGHTINGS

Bidders shall be evaluated in terms of the following parameters:

10.1. BID EVALUATION

Bids will be evaluated in accordance with the following technical criteria:

10.1.1. Compulsory Requirements

All bid responses that do not meet compulsory requirements will be disqualified and will not be considered for further evaluation.

1. BACKGROUND INFORMATION

1.1. About JOSHCO

JOSHCO, acting as the agent of the City of Johannesburg (COJ), is inviting proposals from contractors. For information purposes and to enquire as regards to who JOSHCO is and what they do please visit the website at www.JOSHCO.co.za . It has been assumed that the service provider is familiar with the business of JOSHCO and fully understands its mandate and general day-to-day business activities and what its vision and mission is in terms of providing housing.

2. SCOPE OF WORKS

Based on the above; JOSHCO requires a consultants and/or service provider to:

- To ensure continuous collection and management of the utility's accounts for all JOSHCO properties with inhouse vending solutions and to further ensure that we strike a balanced reconciliation of both tenants' unit consumption and the building's bulk meters billing from the City.
- Manage all water & electricity queries logged & replacement of faulty water & electricity meters.
- Monitor regular site visits to all projects & attend to all new metering requests escalated by the Utilities Management Officer.
- Management of the monthly reporting on jobs logged and provide regular feedback on jobs logged to housing management
- Provide solutions for water losses or unaccounted water usage.
- Attend to all escalated customer queries & facilitate testing of meters when queried.
- Utilities documents, reports, and records are accurate, complete, and timely and filed properly
- Daily monitoring managing of online smart water meters.
- JOSHCO will further assume responsibility of ensuring the integrity, accuracy and timeliness of utilities recoveries for each of our projects working together with the appointed service provider for the internal vending system.
- Inspection of water meter readers in our facilities and whether they are linked to Unit numbers or not and report thereof per facility
- Verification of the formula used in each meter reader for calculating usage thereof

The projects affected are the following:

| Facility Name | Units No. |
|---|------------------|
| 106 Claim Street | 85 |
| 16 Wolmarans (Dakalo Student Accommodation) | 89 |

| | |
|-------------------------------|-----|
| AA House | 254 |
| African Diamond | 61 |
| Bellavista Infill | 36 |
| Citrine Court | 79 |
| City Deep New (Greenfields) | 329 |
| Devland | 255 |
| Dobsonville | 502 |
| Ekhaya Gardens/ Princess Plot | 333 |
| Europa House | 167 |
| Fleurhof Ph. 1 (Junction) | 452 |
| Fleurhof Ph. 2 (Riverside) | 252 |
| Hoek Street | 265 |
| Kliptown Square | 478 |
| Legae | 92 |
| Luffereng | 406 |
| Orlando Ekhaya 1 &2 | 292 |
| Pennyville (Flats) | 198 |
| Pennyville Rooms | 564 |
| Phoenix House | 135 |
| Raschers' Building | 97 |
| Riverside Phase 1-3 | 363 |
| Roodepoort/ Tshedzani | 432 |
| Textile Building | 162 |
| The Ridge (Abel Street) | 150 |
| Turffontein | 525 |
| Union Square | 341 |

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1. DELIVERABLES

- Vending System set-up and training, reporting, advisory, & support
- Hosted System Prepaid Electricity & Water vending
- Data Management Revenue Protection
- Inspecting of Prepaid meters, and meter sealing & status reporting
- Token change-over: SGC & Tariff .
- Automated meter reading device - water (Data collection, meter configs., AMR)
- Assess JOSHCO's current formula used to measure water usage;
- Verify and confirm if all meters readers for these projects are in working order;
- Verify if all the meter readers are linked to their respective units by doing tests from inside the unit to the readers' location.
- Verify if all meter readers are marked with Unit numbers.
- Project community awareness, travelling, & partnering with local enterprise
- Attending to all water queries logged & replacement of faulty water meters.
- Regular site visits to all projects
- Attend to all new metering requests
- Monthly reporting on jobs logged
- Provide regular feedback on jobs logged to housing management

Meter Audit

- Perform an Audit in all areas
- Accuracy of consumer meter information;
- Stand (erf) Number
- Indicate Meter Type
- Indicate Meter Box Type
- Indicate meter pipe composite [Galvanized Steel (Metal) / Polyvinyl Chloride Pipes (Plastic)]
- Location of the meter on the property
- Meter Number
- Meter Reading
- Visible damage to meter
- Take image of meter where required
- Register GPS Coordinates
- Register time and date of audit
- Visual identification of possible incorrect tariffs being applied
- Determine households to be metered;
- Identification of indigent households in the pilot project area;
- GIS coordinates of meters of consumer in the project area;
- Ensure updated information is submitted to be updated on current Billing system;

1.1 Meter Reading Services

- Alignment of meter reading process with billing processes;
- Management of meter reading process;

- Monitor and evaluate critical delivery dates as per billing program;
- Quality assurance to be performed on all functions;
- Data transfer between billing system and Meterman;

1.2 Pre-paid Vending

- Ensure and verify that successful vending to water and electricity prepaid meters are installed in all our buildings and report thereof

1.3 Pre-paid Water Meters

- Verify Buildings with Installed Prepaid water meters
- Configure Water Management Device
- Submit Document installation process (Electronically)
- Submit information to JOSCHO, to update Billing system
- Submit information to Vending Service Provider to ensure Vending can be done

1.4 PREPAID Water Meter Maintenance, Support & Monitoring

- Product support for the duration of pilot project
- Daily monitoring of water management devices via the Solar Fixed Data Collectors "SFDC" and/or Mobile Data Collectors "MDC".

1.5 Prepaid Vending Performance & Utility Consumption Reporting

- To support ongoing operational governance, revenue management oversight, and prepaid utility performance monitoring, it is recommended that a structured monthly prepaid vending and utility performance reporting framework be maintained throughout the operational sustainment phase.
- The reporting framework should provide monthly visibility relating to prepaid utility sales, infrastructure performance, meter activity, consumption trends, and operational performance indicators across all participating JOSHCO properties.

1.6 Monthly Prepaid Vending Reporting

The following key prepaid vending indicators should be monitored and reported monthly:

| Report Category | Description |
|---------------------------------|---|
| Total Prepaid Sales Value | Total monthly prepaid utility sales generated |
| Total Units Vended | Total utility units purchased by consumers |
| Number of Active Vending Meters | Total meters actively vending during the reporting period |
| Average Consumer Purchase Value | Average Prepaid purchase amount per consumer |
| | |

2. Additional Critical and Outstanding Services Required

- Vending Service: Prepaid electricity vending system, 3rd party vending, & support
 - Revenue Protection service: Data/meter audit, SGC & TID Rollover, & temper sealing
 - Tenants engagement: project awareness campaign & communication
- Installation normalization: meter installation/replacement, & bypass normalization

3. Evaluation Criteria:

| | Stage 1 – Functionality | Weight |
|-----------|--|---------------|
| 1. | <p>Capability (Qualified staff, resources etc.)</p> <p>Project manager with an IT related degree = 10 points</p> <p>Middle personnel = 5 points</p> <p>IT Technician with an IT related Diploma = 5 Points</p> <p>Junior It staff = 2 points</p> <p><i>Bidders to submit certified copies of IT related qualifications for the proposed team above.</i></p> | 20 |
| 2. | <p>Previous Experience (Reference letters not older than 3 years)</p> <p>2-3 Reference letters = Points</p> <p><i>Bidders must submit Witten reference letters, in a client's letter head, where similar services was rendered.</i></p> | 20 |

| | | |
|----|---|------------|
| 3. | Certified in Control Objectives for Information and related Technology (COBIT) and TOGAF The Open Group Architecture Framework (TOGAF). Certificate in COBIT = 10 Points Certificate in TOGAF = 10 Points <i>Bidders to submit certified copies of the certificate stated above</i> | 20 |
| 4. | Understanding Local Government Space (Previous experience in local government) <i>Bidders must submit Witten reference letters, in a client's letter head, where similar services was rendered</i> | 20 |
| 5 | Experience for the personnel | 20 |
| | Total Functionality Points | 100 |

3. DURATION OF THE SERVICE

Project shall be for duration of not exceeding four (4) months from the appointment date.

PRICING SCHEDULE

| NO. | ITEM DESCRIPTION | UNIT OF MEASURE | QTY | FEES |
|-----|--|--------------------------|-----|------|
| 1 | System set up and training | Once-Off | 1 | |
| 2 | Implementation: Interface with financial system | Once-off | 1 | |
| 3 | Vending Fee % | Monthly Variable | 1 | |
| 4 | Professional Services: Training, reporting, advisory, & support | Monthly Variable | 1 | |
| 5 | Data Management Revenue Protection (Once-off) | Rand per inspected meter | 1 | |
| 6 | Inspecting of Prepaid meters and meter sealing & status reporting | Rand per inspected meter | 1 | |

| | | | | |
|----|---|--------------------------|---|--|
| | (Once-off) | | | |
| 7 | Token change-over: SGC, KRN, & Tariff (Once-off) | Rand per inspected meter | 1 | |
| 8 | Remove tempers Install new meter Replace Customer Interface Unit (CIU) | Rand per inspected meter | 1 | |
| 9 | Hosted System S3 Prepaid Electricity & Water vending | Per Month | 1 | |
| 10 | No Access (Once-off) Planned/Scheduled Meter inspection visit unavailable. (i.e. Dobsonville) | Per meter | 1 | |
| | | SUB TOTAL | | |
| | | VAT 15% | | |
| | | GRAND TOTAL | | |

MBD 1

INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE JOHANNESBURG SOCIAL HOUSING COMPANY (SOC) LTD

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 POSTED TO:

.....

Or

DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)

.....

.....

.....

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

The bid box is generally open during working hours i.e. 08:00 – 16:00

Monday to Friday.

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, 2022, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT
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 A VALID TAX CLEARANCE CERTIFICATE BEEN SUBMITTED / SARS Pin? **(MBD 2)**

YES or NO

HAS A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE BEEN SUBMITTED? **(MBD 6.1)**

YES or NO IF YES, WHO WAS THE CERTIFICATE ISSUED BY?

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

YES or NO

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

YES or NO

A REGISTERED AUDITOR

YES or NO

(A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE)

ARE YOU THE ACCREDITED REPRESENTATIVE?

IN SOUTH AFRICA FOR THE GOODS | SERVICES | WORKS OFFERED? **YES or NO**

[IF YES ENCLOSE PROOF]

SIGNATURE OF BIDDER.....

DATE

CAPACITY UNDER WHICH THIS BID IS
SIGNED.....
TOTAL BID PRICE.....
TOTAL NUMBER OF ITEMS OFFERED

MBD 2

TAX CLEARANCE CERTIFICATE REQUIREMENTS

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

- 1** In order to meet these requirements bidders are required to complete in full the attached form TCC 001 "Application for a Tax Clearance Certificate" and submit it to any SARS branch office nationally. The Tax Clearance Certificate Requirements are also applicable to foreign bidders / individuals who wish to submit bids.
- 2** 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 valid Tax Clearance Certificate/ SARS Pin must be submitted together with the bid. Failure to submit a valid Tax Clearance Certificate/SARS Pin may 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/ SARS pin.
- 5 Copies of the TCC 001 "Application for a Tax Clearance Certificate" form are available from any SARS branch office nationally or on the website www.sars.gov.za.
- 6 Applications for the Tax Clearance Certificates may also be made via e-filing. In order to use this provision, taxpayers will need to register with SARS as filers through the website www.sars.gov.za.

SARS Pin

Consortia/Joint Ventures/sub-contractor

Company Name.....

Company Name.....

SARS Pin Number

SARS Pin Number.....

Company Name

SARS Pin Number

MBD 3.3

PRICING SCHEDULE

| |
|--------------------------|
| NAME OF BIDDER: |
| BID NO.: |
| CLOSING TIME |
| CLOSING DATE..... |

OFFER TO BE VALID FOR ...**120**...DAYS FROM THE CLOSING DATE OF BID.

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

1. The accompanying information must be used for the formulation of proposals.
2. Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project. R.....
3. PERSONS WHO WILL BE INVOLVED IN THE PROJECT AND RATES APPLICABLE (CERTIFIED INVOICES MUST BE RENDERED IN TERMS HEREOF)

| 4. PERSON AND POSITION | HOURLY RATE | DAILY RATE |
|------------------------|-------------|------------|
| ..... | R..... | ..... |
| ..... | R..... | ..... |
| ..... | R..... | ..... |
| ..... | R..... | ..... |
| ..... | R..... | ..... |

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

| | | |
|-------|--------|-----------|
| ..... | R..... |days |
| ..... | R..... |days |
| ..... | R..... |days |
| ..... | R..... |days |

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

| DESCRIPTION OF EXPENSE TO BE INCURRED | RATE | QUANTITY | AMOUNT |
|---------------------------------------|-------|----------|--------|
| | | | |
| | | | |
| | | | |
| | | | |

TOTAL: R.....

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

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

| DESCRIPTION OF EXPENSE TO BE INCURRED | RATE | QUANTITY | AMOUNT |
|---------------------------------------|-------|----------|--------|
| | | | |
| | | | |
| | | | |
| | | | |

TOTAL: R.....

- 6. Period required for commencement with project after acceptance of bid
.....
- 7. Estimated man-days for completion of project.....
- 8. Are the rates quoted firm for the full period of contract? ***YES/NO**
- 9. If not firm for the full period, provide details of the basis on which adjustments will be applied for, for example consumer price index.
.....
.....

MBD 4

DECLARATION OF INTEREST

- 1. No bid will be accepted from persons in the service of the state
- 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 favouritism, 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 authorised representative declare their position in relation to the evaluating/adjudicating authority and/or take an oath declaring his/her interest.
- 3. **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**
 - 3.1 **Full Name:**
 - 3.2 **Identity Number:**
 - 3.3 **Company Registration Number:**
 - 3.4 **Tax Reference Number:**

3.5 **VAT Registration Number:**

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

3.6.1 If so, furnish particulars.

.....
.....

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

3.7.1 If so, furnish particulars.

.....
.....

* 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.

3.8. 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**

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?

3.8.1 If so, furnish particulars.

.....
.....

3.9 Are you, aware of any relationship (family, friend, other) between a 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**

Are you, aware of any relationship (family, friend, other) between a bidder and any persons in the service of the state who may be involved with the evaluation and or Adjudication of this bid?

3.9.1 If so, furnish particulars
.....
.....

3.10 Are any of the company's directors, managers, principal shareholders or stakeholders in service of the state? **YES / NO**
If so, furnish particulars.
.....
.....

3.11 Are any spouses, child or parent of the company's directors, managers, principal shareholders or stakeholders in service of the state? **YES / NO**

3.11.1 If so, furnish particulars.
.....
.....

CERTIFICATION

I, THE UNDERSIGNED (NAME)

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

I ACCEPT THAT THE STATE MAY ACT AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.

Signature: **Date:**

Position: **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 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, 2022.

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

1.3 Preference points for this bid shall be awarded for:

- (a) Price; and
- (b) Specific goals.

1.4 The maximum points for this bid 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 bidder 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 bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim regarding preferences, in any manner required by the organ of state.

2. DEFINITIONS

2.1 **“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;

2.2 **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;

2.3 **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

2.4 **“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

2.5 **“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

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

80/20

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

90/10

$$Ps = 90 \left(1 - \frac{Pt - Pmax}{Pmax} \right)$$

Where

- Ps = Points scored for tender under consideration
- Pt = Price of bid 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.)

| Historically Disadvantaged Individuals - HDI | 80/20 Preferential Point System | 90/10 Preferential Point System | Means of Verification |
|---|---------------------------------|---------------------------------|--|
| | 20 | 10 | |
| Race – people who are Black, Coloured or Indian | 10 | 4 | CSD report, Certified Copy of Identity Documentation and share certificate |
| Gender - Women | 3 | 2 | CSD report, Certified Copy of Identity Documentation and share certificate |
| Youth | 4 | 2 | CSD report, Certified Copy of Identity Documentation and share certificate |
| Disability | 3 | 2 | Certified copy of disability certificate |

| Historically Disadvantaged Individuals - HDI | 80/20 Preferential Point System | 90/10 Preferential Point System | Means of Verification |
|--|---------------------------------|---------------------------------|-----------------------|
| | 20 | 10 | |
| | | | and share certificate |

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 necess

.....

SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME:

DATE:

ADDRESS:

.....

.....

.....

CONTRACT FORM - RENDERING OF SERVICES

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

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

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

2. The following documents shall be deemed to form and be read and construed as part of this agreement:
 - (i) Bidding documents, viz
 - Invitation to bid;
 - Tax clearance certificate;
 - Pricing schedule(s);
 - Filled in task directive/proposal;
 - Preference claims for Broad Based Black Economic Empowerment Status Level of Contribution in terms of the Preferential Procurement Regulations 2011;
 - Declaration of interest;
 - Declaration of bidder's past SCM practices;
 - Certificate of Independent Bid Determination;
 - Special Conditions of Contract;
 - (ii) General Conditions of Contract; and
 - (iii) Other (specify)

- 3. I confirm that I have satisfied myself as to the correctness and validity of my bid; that the price(s) and rate(s) quoted cover all the services specified in the bidding documents; that the price(s) and rate(s) cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.
- 4. I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this agreement as the principal liable for the due fulfilment of this contract.
- 5. I declare that I have no participation in any collusive practices with any bidder or any other person regarding this or any other bid.
- 6. I confirm that I am duly authorised to sign this contract.

NAME (PRINT)

CAPACITY

SIGNATURE

NAME OF FIRM

DATE

| | |
|------------------|-------|
| WITNESSES | |
| 1 | ..... |

MBD 7.2

CONTRACT FORM - RENDERING OF SERVICES

PART 2 (TO BE FILLED IN BY THE PURCHASER)

1. I..... in my capacity
as..... Accept your bid under reference
numberdated.....for the rendering of services indicated
hereunder and/or further specified in the annexure(s).
2. An official order indicating service delivery instructions is forthcoming.
3. I undertake to make payment for the services rendered in accordance with the terms
and conditions of the contract, within 30 (thirty) days after receipt of an invoice.

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

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

SIGNED AT **ON**

NAME (PRINT).....

SIGNATURE

OFFICIAL STAMP

WITNESSES

1

2

DATE:

MBD 8

DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

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

| Item | Question | Yes | No |
|-------|---|---------------------------------|--------------------------------|
| 4.1 | <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? (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 Quote Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)? The Register for Quote 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"/> |
| 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: | | |

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

MBD 9

CERTIFICATE OF INDEPENDENT BID DETERMINATION

1. This Standard Bidding Document (MBD) must form part of all bids¹ invite

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.

2. 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.

3. 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.

4. 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.**

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.**

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.
- 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