



**T29/09/18**

**APPOINTMENT OF A SERVICE PROVIDER TO  
REPLACE AND MAINTAIN THE IDC'S BUILDING  
MANAGEMENT SYSTEM**

**COMPULSORY SITE INSPECTION WILL BE  
HELD AS FOLLOWS:**

**DATE: 10 SEPTEMBER 2018**

**TIME: 11h00am**

**VENUE: IDC HEAD OFFICE 19 FREDMAN DRIVE,  
SANDTON**

**BID CLOSING DATE: TUESDAY, 25 SEPTEMBER  
2018 AT 12:00 NOON**

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## **SECTION 1: GENERAL CONDITIONS OF BID**

## 1. Proprietary Information

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Industrial Development Corporation of SA Ltd (IDC) considers this Request for Proposal (RFP) and all related information, either written or verbal, which is provided to the respondent, to be proprietary to IDC. It shall be kept confidential by the respondent and its officers, employees, agents and representatives. The respondent shall not disclose, publish, or advertise this RFP or related information to any third party without the prior written consent of IDC.

## 2. Enquiries

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- 2.1 All communication and attempts to solicit information of any kind relative to this RFP should be channelled **in writing** to:

Name: Mr Luyanda Dlamini  
Telephone Number: Office: +27 11 269 3767  
Email address: [luyandad@idc.co.za](mailto:luyandad@idc.co.za)

- 2.2 Enquiries in relation to this RFP will not be entertained after **16h00 on 17 September 2018**.
- 2.3 The enquiries will be consolidated and IDC will issue one response and such response will be posted, within two days after the last day of enquiries, onto the IDC website ([www.idc.co.za](http://www.idc.co.za)) under tenders i.e. next to the same RFP document.
- 2.4 The IDC may respond to any enquiry in its absolute discretion and the bidder acknowledges that it will have no claim against the IDC on the basis that its bid was disadvantaged by lack of information, or inability to resolve ambiguities.

## 3. Bid Validity Period

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Responses to this RFP received from bidders will be valid for a period of 120 days counted from the bid closing date.

## 4. Instructions on submission of Bids

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- 4.1 Bids should be submitted in duplicate (2 hard copies) and one electronic copy (on CD) in PDF format all bound in a sealed envelope endorsed, **T29/09/18: Appointment of a service provider to replace and maintain the IDC's building management system**. The sealed envelope must be placed in the bid box at the Main Reception area of the IDC Building, 19 Fredman Drive Sandton by no later than 12:00 noon on **Tuesday, 25 September 2018**.
- 4.2 Bids must be submitted in the prescribed response format, herein reflected as Response Format.
- 4.3 The bid closing date, bidder 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 bid response, the bid description must be endorsed on the delivery note/courier packaging and the courier must ensure that documents are placed / deposited into the bid box. **The IDC will not be held responsible for any delays where bid documents are handed to the IDC Receptionist.**

- 4.5 No bid response received by telegram, telex, email, facsimile or similar medium will be considered.
- 4.6 Where a bid response is not in the bid box at the time of the bid closing, such a bid document will be regarded as a late bid. **It is the IDC's policy not to consider late bids for tender evaluation.**
- 4.7 Amended bids may be sent in an envelope marked "Amendment to bid" and should be placed in the bid box before the closing time.

## 5. Preparation of Bid Response

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- 5.1 All the documentation submitted in response to this RFP must be in English.
- 5.2 The bidder is responsible for all the costs that it shall incur related to the preparation and submission of the bid document.
- 5.3 Bids submitted by bidders which are, or are comprised of companies must be signed by a person or persons duly authorised thereto by a resolution of the applicable Board of Directors, a copy of which Resolution, duly certified, must be submitted with the bid.
- 5.4 The bidder should check the numbers of the pages of its bid to satisfy itself that none are missing or duplicated. No liability will be accepted by IDC in regard to anything arising from the fact that pages of a bid are missing or duplicated.
- 5.5 Bidder's tax affairs with SARS must be in order (tax compliant status) and bidders must provide written confirmation to this effect as part of their tender response.

## 6. Supplier Performance Management

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

The successful bidder shall upon receipt of written notification of an award, be required to conclude a Service Level Agreement (SLA) with the IDC, which will form an integral part of the supply agreement. The SLA will serve as a tool to measure, monitor and assess the supplier performance and ensure effective delivery of service, quality and value-add to IDC's business.

Successful bidders will be required to comply with the above condition, and also provide a scorecard on how their product / service offering is being measured to achieve the objectives of this condition.

## 7. Enterprise and Supplier Development

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The IDC promotes enterprise development. In this regard, successful bidders may be required to mentor SMMEs and/ or Youth-Owned businesses. The implications of such arrangement will be subject to negotiations between the IDC and the successful bidder.

## 8. IDC's Rights

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- 8.1 The IDC is entitled to amend any bid condition, bid validity period, RFP specification, or extend the bid closing date, all before the bid closing date. All bidders, to whom the RFP documents have been issued and where the IDC have record of such bidders, may be advised in writing of such amendments in good time and any such changes will also be posted on the IDC's website under the relevant tender information. All prospective bidders should therefore ensure that they visit the website regularly and before they submit their bid response to ensure that they are kept updated on any amendments in this regard.
- 8.2 The IDC reserves the right not to accept the lowest priced 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 functionally acceptable and/or financially advantageous to the IDC.
- 8.3 The IDC reserves the right to award this bid as a whole or in part.
- 8.4 The IDC reserves the right to conduct site visits at bidder's corporate offices and / or at client sites if so required.
- 8.5 The IDC reserves the right to consider the guidelines and prescribed hourly remuneration rates for consultants as provided in the **National Treasury Instruction 01 of 2013/2014: Cost Containment Measures**, where relevant.
- 8.6 The IDC reserves the right to request all relevant information, agreements and other documents to verify information supplied in the bid response. The bidder hereby gives consent to the IDC to conduct background checks, including FICA verification, on the bidding entity and any of its directors / trustees / shareholders / members.
- 8.7 The IDC reserves the right, at its sole discretion, to appoint any number of vendors to be part of this panel of service providers.

## 9. Undertakings by the Bidder

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- 9.1 By submitting a bid in response to the RFP, the bidder will be taken to offer to render all or any of the services described in the bid response submitted by it to the IDC on the terms and conditions and in accordance with the specifications stipulated in this RFP document.
- 9.2 The bidder shall prepare for a possible presentation should IDC require such and the bidder will be required to make such presentation within five (5) days from the date the bidder is notified of the presentation. Such presentation may include a practical demonstration of products or services as called for in this RFP.
- 9.3 The bidder agrees that the offer contained in its bid shall remain binding upon him/her and receptive for acceptance by the IDC during the bid validity period indicated in this RFP and its acceptance shall be subject to the terms and conditions contained in this RFP document read with the bid.
- 9.4 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 for the services contemplated in this RFP; and that he/she accepts that any mistakes regarding price(s) and calculations will be at his/her risk.

- 9.5** The successful bidder accepts full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on him/her under the supply agreement and SLA to be concluded with IDC, as the principal(s) liable for the due fulfilment of such contract.
- 9.6** The bidder accepts that all costs incurred in the preparation, presentation and demonstration of the solution offered by it shall be for the account of the bidder. All supporting documentation and manuals submitted with its bid will become IDC property unless otherwise stated by the bidder/s at the time of submission.

## **10. Reasons for disqualification**

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- 10.1** The IDC 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 will be notified in writing of such disqualification:
- 10.1.1 bidders who do not submit an original valid Tax Clearance Certificate and / or proof of application of such as endorsed by SARS on the closing date and time of the bid submission and / or failure to provide the IDC with its SARS issued Tax Verification PIN code giving access to the IDC to electronically verify tax compliance;
  - 10.1.2 bidders who submit incomplete information and documentation according to the requirements of this RFP document;
  - 10.1.3 bidders who submit information that is fraudulent, factually untrue or inaccurate information;
  - 10.1.4 bidders who receive information not available to other potential bidders through fraudulent means;
  - 10.1.5 bidders who do not comply with any of the **mandatory requirements** as stipulated in the RFP document;
  - 10.1.6 bidders who fail to comply with FICA requirements

## **11. Local Production and Content**

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The IDC promotes Local Production and Content. In the case of designated sectors, only locally produced goods, services or works or locally manufactured goods, with a stipulated minimum threshold for local production and content will be considered. IDC reserves the right at its sole discretion to set minimum thresholds for sectors which may not have been declared as designated sectors by the dti in an effort to stimulate local production and content where relevant.

Bidders are required to assess their product and /or service offering against the designated sector lists as published by the Department of Trade and Industry (the **dti**) and to ensure full compliance to the minimum local content threshold, if relevant, before submitting its response to this tender. The **dti's** latest list of designated sectors can be accessed on: [http://www.dti.gov.za/industrial\\_development/ip.jsp](http://www.dti.gov.za/industrial_development/ip.jsp).



## 12. Response Format (Returnable Schedules)

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Bidders shall submit their bid responses in accordance with the response format specified below (each schedule must be clearly marked):

**12.1 Cover Page:** (the cover page must clearly indicate the RFP reference number, bid description and the bidder's name)

**12.2 Schedule 1:**

12.2.1 Executive Summary (explaining how you understand the requirements of this RFP and the summary of your proposed solution)

12.2.2 Annexure 1 of this RFP document (duly completed and signed)

**12.3 Schedule 2**

12.3.1 Valid Tax Clearance Certificate(s) (TCC) and / or proof of application as endorsed by SARS and / or SARS issued tax verification pin code;

12.3.2 Originally certified copies of bidder's CIPC company registration documents listing all members with percentages, in case of a CC.

12.3.3 Copy of Board Resolution, duly certified;

12.3.4 Originally certified copy of ID document for the Company Representative

12.3.5 Annexure 2 of this RFP document (duly completed and signed);

12.3.6 Annexure 3 of this RFP document (duly completed and signed);

12.3.7 Annexure 4 of this RFP document (duly completed and signed);

12.3.8 Annexure 5 of this RFP document (duly completed and signed);

12.3.9 Annexure 6 of this RFP document (duly completed and signed);

12.3.10 Annexure 7 of this RFP document (duly completed and signed);

12.3.11 Response to Annexure 8: BEE Commitment Plan

12.3.12 B-BBEE verification certificate indicating the contribution level of the bidding entity. An Exempted Micro Enterprises (EME) with an annual turnover less than R10 million, is only required to obtain a sworn affidavit confirming the annual total revenue and level of black ownership. A Qualifying Small Enterprise (QSE) that has 51% or more black beneficiaries may obtain a sworn affidavit confirming the annual total revenue and level of black ownership. If a bidder is a Joint Venture or Consortium, the bidder must submit a consolidated B-BBEE scorecard as if they were a group structure. Any misrepresentation in terms of the declaration constitutes a criminal offence as set out in the B-BBEE Act as amended.

**Note: If a bidder is a Consortium, Joint Venture or Prime Contractor with Subcontractor(s), the documents listed above (12.3.1-12.3.8) must be submitted for each Consortium/JV member or Prime Contractor and Subcontractor(s).**

12.3.13 Annexure 9 of this RFP document (duly completed and signed, **if relevant**);

12.3.14 Statement of Financial Position of the Bidder: Latest Audited Financial Statements (where applicable in terms of the Company's Act) and/or independently reviewed financial statements and/or Cashflow Budget for new entities with no financial records.

12.3.15 Copy of Joint Venture/ Consortium/ Subcontracting Agreement duly signed by all parties (if applicable)

**12.4 Schedule 3:**

12.4.1 Response to Section 3 of this document, in line with the format indicated in this RFP document.

12.4.2 Annexure 7 of this RFP document, duly completed and signed

**12.5 Schedule 4: Price Proposal (response to Section 4 of this RFP document) (Must be submitted in a separate envelope within the sealed envelope of the bid)**

**12.6 One (1) CD with all Schedules listed above, also included in the sealed envelope of the bid**

## 13. Evaluation Criteria and Weightings

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Bids shall be evaluated in terms of the following process:

- 13.1 Phase 1: Initial Screening Process:** During this phase, bid responses will be reviewed for purposes of assessing compliance with RFP requirements including the general bid conditions and also the Specific Conditions of Bid, which requirements include the following:
- Submission of a valid Tax Clearance Certificate as referenced in 12.3.1 above
  - Submission of Company Registration Forms as referenced 12.3.2 above
  - Submission of ID copy for the Company Representative as referenced in 12.3.4 above
  - BEE Status Certification as referenced in 12.3.12 above and the consideration of the Specific Bid Conditions as referenced in Section 2
  - Completion of all Standard Bidding Documents and other requirements, as reflected in this RFP, which covers the following:
    - Section 3: Statement of compliance with the Functional Evaluation Criteria for this RFP
    - Section 4: Cost Proposal and Price Declaration Form
    - Annexure 1: Acceptance of Bid Conditions
    - Annexure 2: Tax Compliance Requirements
    - Annexure 3: Supply Chain Management Questionnaire
    - Annexure 4: Declaration of Interest
    - Annexure 5: Certificate of Independent Bid Determination
    - Annexure 6: Shareholders' Information/ Group Structure
    - Annexure 7: Bidders Experience & Project Team
    - Annexure 8: BEE Commitment Plan
    - Annexure 9: Disclosure Statement
    - Annexure 10: Local Content Declaration (If Relevant)

Failure to comply with the requirements assessed in Phase 1 (compliance), may lead to disqualification of bids.

### 13.2 Phase 2: Technical/ Functionality Evaluation

Bid responses will be evaluated in accordance with the Functional criteria as follows:

13.2.1 **Other Functional/ Technical Requirements**

With regard to the other Functional Requirements, the following criteria (set out in more detail in section 3 of this RFP document) and the associated weightings will be applicable:

<b>ELEMENT</b>	<b>WEIGHT</b>
BIDDER'S EXPERIENCE	40%
BIDDERS PROPOSED UPGRADE METHODOLOGY	20%
BIDDERS PROPOSED MAINTENANCE METHODOLOGY	10%
QUALIFICATIONS, SKILLS AND EXPERIENCE OF THE PROPOSED TEAM AND TEAM LEADER	30%
<b>TOTAL</b>	<b>100%</b>

**Note: Bidders that fail to achieve the minimum qualifying score of 70% on functional/technical requirements will not be considered for further Price and BEE evaluation.**

13.3 **Phase 3: Preference Point System**

All bids that achieve the minimum qualifying score for Functionality (acceptable bids) will be evaluated further in terms of the preference point system, as follows:

<b>CRITERIA</b>	<b>POINTS</b>
Price	80
B-BBEE	20
<b>TOTAL</b>	<b>100 points</b>

**14. Promotion of Emerging Black owned Service Providers**

It is the IDC's objective to promote transformation across all industries and/ or sectors of the South African economy and as such, bidders are encouraged to partner with a black owned entity (being 50%+1 black owned and controlled). Such partnership may include the formation of a Joint Venture and/ or subcontracting agreement etc., where a portion of the work under this tender would be undertaken by black owned entities. To give effect to this requirement, bidders are required to submit a partnership / subcontracting proposal detailing the portion of work to be outsourced, level of involvement of the black owned partner and where relevant, submit a consolidated B-BBEE scorecard in-line with the provisions of the PPPFA Regulations which will be considered as part of the B-BBEE scoring listed in 13.3.

## **SECTION 2: SPECIFIC CONDITIONS OF BID**

## **1. Bid Pre-qualification criteria**

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- 1.1 In terms of Regulation 4 of the 2017 PPPFA Regulations, the IDC requires that bidders meet the following pre-qualification criteria:
- (a) Bidders must have a minimum B-BBEE contributor status level of 4 or better.
- 1.2 The IDC will only consider a bid if the relevant bidder meets these pre-qualification criteria. Where a bidder fails to meet these pre-qualification criteria, the bid will be considered an unacceptable bid and will be disqualified from further evaluation.

## **SECTION 3: FUNCTIONAL REQUIREMENTS SPECIFICATION**

## **SECTION 3: FUNCTIONAL REQUIREMENTS SPECIFICATION**

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### **1. Special instructions to bidders**

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- 1.3 Should a bidder have reason to believe that the Functional Requirements are not open/fair and/or are written for a particular service provider; the bidder must notify IDC Procurement within five (5) days after publication of the RFP.
- 1.3 Bidders shall provide full and accurate answers to the questions posed in this RFP document, and, where required explicitly state either “Comply/Not Comply” regarding compliance with the requirements. Bidders **must** substantiate their response to all questions, including full details on how their proposal/solution will address specific functional/ technical requirements; failure to substantiate may lead to the bidder being disqualified. All documents as indicated must be supplied as part of the bid response.
- 1.3 Failure to comply with Mandatory Requirements may lead to the bidder being disqualified.

### **2. Purpose**

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The IDC seeks to obtain the services of a capable and experienced service provider to assist in the replacement of the current IDC Building Management System (BMS), as well as to provide the associated three (3) year maintenance contract.

### **3. Project Background and Objectives**

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The IDC Head Office campus in Sandton consists of two (2) buildings, namely IDC 1 and IDC 2. IDC1 has a floor space of 26 500m<sup>2</sup> and consists of a Training Centre that houses the canteen and five blocks, namely A, B, C,D and E. Block E has two (2) parking levels. The HVAC equipment is housed in three (3) Plant Rooms. IDC 2 has a floor space of 3 000m<sup>2</sup> and consists of three (3) floors and two (2) parking levels. The floors consist of an open plan office space, meeting rooms, kitchens and toilet areas. IDC 1 and 2 each have a dedicated server room.

There is a BMS system which monitors and controls the HVAC, and monitors the Generators, UPS's, water/electrical meters and fire panels in the building. The BMS comprises of a Johnson Control Metasys (JC) system which was installed in January 2001 and a Distech Niagara 4 system which was installed in February 2015. The Johnson Control Metasys system monitors and controls the HVAC system including monitoring of fire panels, UPS's and generators which is 80% of the monitoring devices. The Distech Niagara 4 System monitors water meters and diffusers which is 20% of monitoring devices.



#### **4. Scope of Work**

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The appointed service provider is expected to be capable of providing the following:

##### **4.1 REPLACEMENT OF THE JOHNSON CONTROLS SYSTEM**

Replace the current JC system with a new BMS system capable of handling approximately 4,500 points and that is a Niagara 4 open platform system compliant / compatible. The JC BMS consists of nine (9) Network Automation Engine (NAE) network devices, 20 extended digital master controllers (DX) and 35 extension modules (XT). In total, there are 472 controllers, which are connected to 4453 points as indicated in the list of devices and points as per Annexure B below.

##### **4.2 Project and Specifications include, but are not limited to:**

- Replacement of all Johnsons Controls equipment.
- Ensure that the replacement is in line with the already upgraded Niagara system.
- Integration to existing Network and controls
- Integration to existing Niagara controllers as specified in this tender (Refer to Annexure C)

##### **4.2.1 Supporting Documents**

- JC BMS Topography - Annexure A
- JC BMS Devices and Points - Annexure B
- Niagara system layout - Annexure C

##### **4.2.2 Bidders Experience**

The bidder must have relevant experience in the installation of Niagara BMS systems. The team which will be deployed at the IDC for the implementation must also have relevant qualifications, skills and experience in such installations. Furthermore, the proposed team must have at least five (5) years' experience in Niagara Building Management System installations and system replacement projects.

##### **4.2.3 Project Programme**

It is envisaged that the new system should be fully implemented by end February 2019 (latest). The IDC intends to appoint the successful bidder by the end of October 2018 (latest). Bidder to supply a methodology, project programme/project plan for the BMS replacement taking the above timelines in consideration. The programme should include all the relevant key activities. The programme timing and sequencing should be appropriate and consistent with the project objectives and requirements of this tender. The project programme is to also include an implementation plan on how to prevent disruption to services and clearly address the inter-dependencies on the project activities. Bidder must indicate the methods to be used to

conduct the work on the live systems. Finally, the project programme must include operations and resources linked to project activities.

### 4.3 PREVENTATIVE MAINTENANCE

Provide maintenance for a three (3) year period on the new system and the existing Niagara system.

- 4.3.1 Perform maintenance and part replacement in accordance with the manufacturer's recommendations and in accordance with good maintenance practice to ensure continued operation of the plant and maximum equipment uptimes.
- 4.3.2 Report any trends detected that reflect system or equipment degradation, loss of performance, or frequency of failure to the IDC.
- 4.3.3 One technician is to be on site from 07h00 to 16h00 for 5 working days (Monday to Friday).
- 4.3.4 In addition to the scheduled daily maintenance, the technician will be required to attend to the following daily duties:
  - Check BMS Alarms
  - Monitoring of Network and IT room sensors.
  - Monitoring floor temperatures of all buildings.
  - Ensure HVAC plants have started up and are in operation.
  - Conduct a visual inspection through all plant rooms checking for any visible faults or any irregularities.
  - Monitoring and testing of SMS module.
  - Monitoring the canteen fridge and freezer cold-room temperatures
  - Attend to problems reported by Facilities Management e.g. staff complaints and call-outs reported by IDC Air - Conditioning Contractors.
  - Fault - finding on all BMS & HVAC equipment.
  - Assisting the Air - Conditioning Contractors in fault finding.
  - Ordering of material and equipment Related to the BMS parts as referenced in the below Table C.
  - Compiling of reports on request e.g. temperature logs with detailed analysis of problem areas, SMS logs with detailed analysis of situation being reported on.
  - Attend weekly meetings regarding site status.
  - Monitoring of generators and UPSs (during a power failure).
  - Setting of time schedules for Air Conditioners to run during functions in Auditorium. This is to be done on a weekly basis, as per weekly schedule provided by Facilities Management.

**Note:** The IDC will not be liable for any other cost relating to resolving of system faults and problems if the technician on site is not capable of resolving these problems. Call - Outs, which includes all senior staff and members and such support to the on-site technician for errors which is unresolved, will therefore be at no additional cost to the IDC.

## **4.4 BMS SYSTEM STANDARD MAINTENANCE**

The service provider will be required to do BMS system standard maintenance service work as follows:

### **4.4.1 Central Computer:**

- Clean computer
- Check cables for tightness of connections
- Check that networks is communicating to all network devices
- Make sure that all network devices have been uploaded to the archive machine
- Complete back-up of the archive machine
- Update graphics and information monthly
- Attend to any complaints, programming breakdowns and after hour call outs logged by IDC.

### **4.4.2 Network Control Devices:**

- Where applicable check the battery as per manufacturer's specifications
- Check the functionality of the network device
- Check the connections to the field devices
- Run diagnostics
- View and print error log
- View historical Data base
- View event log

### **4.4.3 Controls:**

- Examine and clean controls (record the schedule of equipment)
- Recalibrate as required
- Functionally test all items
- Check system performance (document, record and report)
- Make all necessary adjustments to optimize the efficiency of plant operation
- Inspect and lubricate valves (record the schedule of equipment)
- Check and adjust the valve stroke
- Check and adjust the valve shut-off
- Inspect damper actuators for correct action (record the schedule of equipment)
- Lubricate the damper bearings where necessary

### **4.4.4 Application Specific Controller:**

- Check that the correct input/output are listed on the controller
- Functionally test all the displays on the controllers
- Record a complete schedule of equipment readings
- Drive all actuators
- Make service records

#### **4.4.5 Administration:**

- If any changes are made on the Service Schedule this must be noted
- All monthly reports are to be signed by the IDC Representative
- Copies of all reports to be kept on site.

#### **4.5 EMERGENCY CALL OUTS SERVICES**

- The service provider must have 24/365 callout out facility.
- The maximum period within which the service provider must respond to an emergency call out or to equipment breakdowns from notification is:
  - 2 hours for critical call-outs
  - 4 hours for non critical call-outs

As per table in 4.9. In the case of no response from the service provider within twenty-four hours on a breakdown call out the IDC may call upon another service provider to rectify the fault without prejudice to the continuation of this contract. All such costs shall be borne by the Main service provider.

- The service provider shall ensure that standby arrangements for emergency call outs are at all times in place.
- A call-out list with technician's names and numbers must to be provided to the IDC as soon as contractor starts work on site.

#### **4.6 MAINTENANCE SCHEDULE**

- The maintenance schedule shall be compiled in accordance with the number of devices and points as per BOQ and Annexure C. All equipment shall be serviced monthly.
- The service provider shall prepare a Maintenance Schedule indicating when specific Preventive Maintenance activities for each piece of equipment shall be performed. All required maintenance activities shall be performed within the required time limits by manufacturers.
- The frequency of maintenance activities shall be in accordance with the Manufacturer's recommendations and as per the Maintenance Schedule.
- The Maintenance schedule shall be in the format agreed with the Client.
- In the event of any delays against the schedule the service provider shall expedite the maintenance work to make up any delays.
- The service provider shall deploy sufficient staff on the contract to ensure completion of the works within programme and within normal working hours. Normal working hours will be from 07H00 to 16H00 Monday to Friday excluding Public Holidays.

#### 4.7 MAINTENANCE MANAGEMENT SYSTEMS

- Compile a full-service maintenance log schedule for all equipment being monitored and controlled by the BMS for the year.
- Draw up the necessary Job Cards from the Maintenance Programme, or in response to emergency call outs, or equipment failure, and hand the completed cards to the Client for verification and acceptance that the work has been duly executed.

#### 4.8 MAINTENANCE STAFF

- The service provider shall employ and manage his Maintenance Staff to ensure timely, efficient execution of the works with minimum interruption to the IDC.
- The Technician carrying out services must be a qualified person who has passed the relevant courses required to perform his duties with a minimum of 5 years' experience and have at least a NQF-Level 4 qualification.
- The Service provider must have at least 3 qualified technicians. The service provider shall provide proof of this.
- Technician and any other staff member working at the IDC must be issued with safety clothing with the company's name clearly visible.
- Maintenance Staff must be fully trained to:
  - Perform the maintenance services.
  - Do fault finding.
  - Capable of doing repairs on all the equipment.

#### 4.9 MEETINGS

The Service provider shall attend Monthly SLA review and Maintenance Co-ordination meetings and any other meetings called by the IDC.

#### 4.10 SERVICE LEVEL AGREEMENT

The service provider must be willing to enter into a signed SLA with the IDC. The following KPI's will form the bases of the SLA:

- Response to resolving day to day system malfunctions. As per "Response Time" in table below.
- Call-Out Response Time as follows:

Criticality of Call Out	Response Time	Resolve Time
Critical Call-Out is defined as a system malfunction which has an impact on the operation of the HVAC system.	Within 2 hours	Within 4 hours
Non-Critical Call-out is defined as all other call outs not classified as critical.	Within 4 hours	Within 8 hours

- Down Time on Equipment – must be at market standards and system availability must be guaranteed to be 95% or more per month.
- Level of Service associated with the contract deliverables i.e. professional conduct on-site by technician and the company during interactions, Invoicing accuracy, limiting the number of breakdowns related to maintenance inefficiency and monthly reporting thereon, etc.
- Level of parts holding must be responsive to meet system up-time guarantees and to comply with Call Out service standards to reach resolve times for any system faults.

#### **4.11 GENERAL**

The Service provider shall ensure the following:

- The safety of users of the equipment;
- All regulations as per the OHS act are adhered to;
- The accuracy and reliability of the equipment performance;
- That Preventative Maintenance is carried out at all times;
- The equipment and associated spaces are kept clean and presentable at all times;
- The Maintenance is carried out in a programmed sequence in accordance with the Maintenance Programme, so as to protect the IDC Investment.

#### **5. Project Timelines**

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The appointed service provider(s) will be required to start immediately after award with the BMS upgrade which must be fully implemented by end February 2019. The maintenance contract will commence from April 2019 for a period of three (3) years.

## 6. Evaluation Criteria

### 6.1 Mandatory Technical Requirements

The bidder must indicate its compliance / non-compliance to the requirements and should substantiate its response in the space provided below. If more space is required to justify compliance, please ensure that the substantiation is clearly cross-referenced to the relevant requirement.

6.1.1 Risk Insurance Cover	Comply	Not Comply
<p>The bidder will be required to provide proof of the below insurance covers within two (2) weeks after appointment:</p> <ul style="list-style-type: none"> <li>• Theft &amp; Malicious Damage: R50 000.00</li> <li>• Transit And Off-Site Storage: R50 000.00</li> <li>• Surrounding Property Limit: R500 000.00</li> <li>• Additional Removal Of Debris: R25 000.00</li> <li>• Claims Preparation Costs: R10 000.00</li> <li>• Public Liability Limit: R5 000 000.0</li> </ul>		
<b>Substantiate / Comments</b>		

### 6.2 Technical Requirements

The bidder must indicate its compliance / non-compliance to the requirements and should substantiate its response in the space provided below. If more space is required to justify compliance, please ensure that the substantiation is clearly cross-referenced to the relevant requirement.

6.2.1 BIDDER'S EXPERIENCE	Comply	Partially Comply	Not Comply
<p>The bidder must demonstrate its relevant experience in providing system replacements and maintenance services on corporate Building Management Systems (BMS).</p> <p>The bidder must provide three (3) relevant contactable references of similar system upgrades and maintenance work done in the past five (5) years. One (1) of the three (3) provided references is to be for Niagara system upgrades and maintenance. Please refer to Table (a) of Annexure 7 of this document for the format in which the required information must be provided.</p>			
<b>Substantiate / Comments</b>			

<b>6.2.2 BIDDER'S PROPOSED MAINTENANCE METHODOLOGY</b>	<b>Comply</b>	<b>Partially Comply</b>	<b>Not Comply</b>
<p>The bidder is required to indicate their compliance to the maintenance requirements as listed under Section 3 of this bid document.</p> <p>The bidder is required to provide a proposal detailing how they are going to provide the preventative maintenance. This proposal is to also include the bidders proposed maintenance programme.</p>			
<b>Substantiate / Comments</b>			

<b>6.2.3 BIDDER'S PROPOSED UPGRADE METHODOLOGY</b>	<b>Comply</b>	<b>Partially Comply</b>	<b>Not Comply</b>
<p>The bidder is required to indicate their compliance to the upgrade requirements and has quoted as required on the BOQ.</p> <p>The bidder must provide a proposal and programme detailing how they are going to execute the upgrade.</p>			
<b>Substantiate / Comments</b>			



<b>6.2.4 QUALIFICATIONS AND SKILLS OF THE PROPOSED TEAM AND TECHNICIAN</b>	<b>Comply</b>	<b>Partially Comply</b>	<b>Not Comply</b>
<p>The bidders proposed team for the upgrade as well as the technician to be deployed at IDC for the maintenance must have relevant qualifications, skills and experience.</p> <p>The proposed team and technician must have three (3) years' experience working on Niagara BMS. The technician to be placed on site must have at least NQF-Level 4 qualification.</p> <p>The bidders must submit, as part of its proposal, the following:</p> <ul style="list-style-type: none"> <li>• The list of the proposed team maintenance technicians. Please refer to <b>Table (b) Annexure 7</b> of this document for the format in which the required information must be provided.</li> <li>• CVs of the team and technicians; and the CVs must clearly highlight qualifications, areas of experience/ competence relevant to the tasks and objectives of this project as outlined above.</li> <li>• Copies of relevant qualifications/certification.</li> </ul>			
<b>Substantiate / Comments</b>			

## **SECTION 4: PRICE PROPOSAL**

## SECTION 4: Cost Proposal

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1 **NOTE: All prices must be VAT exclusive and must be quoted in South African Rand (ZAR).**

2 Are the rates quoted firm for the full period of the contract?

YES	NO
-----	----

**Important:** If not firm for the full period, provide details of the basis on which price adjustments shall be applied e.g. CPI etc.

3 All additional costs associated the bidder's offer must be clearly specified and included in the Total Bid Price.

4

Is the proposed bid price linked to the exchange rate?	Yes	No

***If yes, the bidder must indicate CLEARLY which portion of the bid price is linked to the exchange rate:***

6

Payments will be linked to specified deliverables after such deliverables have been approved by the IDC. Payments will be made within 30 days from date of invoice.	Comply	Not Comply

7

The IDC reserves the right to consider the guidelines on consultancy rates as set out in the <b>National Treasury Instruction 01 of 2013/2014: Cost Containment Measures</b> which took effect from 01 January 2014, where relevant.	Comply	Not Comply

The bidder must indicate if their proposed rates are in line with the provisions of the referenced National Treasury Instruction: Cost Containment Measures.

Substantiate / Comments

## 8. COSTING MODEL

### 8.1 UPGRADE COSTS

Schedule 1 - BMS And Network				
Item	Description	Unit Cost	BOQ Total	Total Cost
<b>1 Network</b>				
General Note: BMS hardware and software required. DGlux licenses or similar required to allow new Graphic (Per Point/s) to be generated within the existing GUI				
1.1	Network Unit - 1 250 points		7	
1.2	Network Unit - 5 000 points		1	
1.3	LON Modules For Network Unit		6	
1.4	N2 Software Drivers For Network Unit		2	
1.5	RS-485 Dual Modules For Network Unit		2	
1.6	Supervisor Add Niagara Device License		8	
1.7	DGlux / similar License Add		10	

## Schedule 2 - Controls

Item	Description	INPUTS	OUTPUTS	Unit Cost	BOQ Total	Total Cost	INPUTS	OUTPUTS
<b>2.1 Station 1</b>								
General Note: Controllers to include LCD Displays for local viewing.								
2.1.1	Master Controller	96	72		6		16	12
2.1.2	Extension Module	120	120		10		12	12
2.1.3	Extension Module	8	0		1		8	0
2.1.4	Termination / Programming / Database (Per Point)				416			
2.1.5	Graphic (Per Point)				416			
2.1.6	Relays (If Required)				40			
<b>Total Points Capacity</b>		<b>224</b>	<b>192</b>					<b>416</b>
<b>2.2 Station 2</b>								
General Note: Controllers to include LCD Displays for local viewing.								
2.2.1	Master Controller	60	48		6		10	8
2.2.2	Extension Module	144	144		12		12	12
2.2.3	Termination / Programming / Database (Per Point)				396			
2.2.4	Graphic (Per Point)				396			
2.2.5	Relays (If Required)				40			

<b>Total Points Capacity</b>		<b>204</b>	<b>192</b>					<b>396</b>
<b>2.3 Station 3</b>								
General Note: Controllers to include LCD Displays for local viewing.								
2.3.1	Master Controller	16	12		1		16	12
2.3.2	Extension Module	24	24		2		12	12
2.3.3	Extension Module	8	0		1		8	0
2.3.4	Termination / Programming / Database (Per Point)				84			
2.3.5	Graphic (Per Point)				84			
2.3.6	Relays (If Required)				10			
<b>Total Points Capacity</b>		<b>48</b>	<b>36</b>					<b>84</b>
<b>2.4 Block E Roof</b>								
General Note: Controllers to include LCD Displays for local viewing.								
2.4.1	Master Controller	16	12		1		16	12
2.4.2	Extension Module	12	12		1		12	12
2.4.3	Termination / Programming / Database (Per Point)				52			
2.4.4	Graphic (Per Point)				52			
2.4.5	Relays (If Required)				20			
<b>Total Points Capacity</b>		<b>28</b>	<b>24</b>					<b>52</b>
<b>2.5 Block D Roof</b>								

General Note: Controllers to include LCD Displays for local viewing.								
2.5.1	Master Controller	16	12		1		16	12
2.5.2	Extension Module	24	24		2		12	12
2.5.3	Termination / Programming / Database (Per Point)				76			
2.5.4	Graphic (Per Point)				76			
2.5.5	Relays (If Required)				20			
<b>Total Points Capacity</b>		<b>40</b>	<b>36</b>					<b>76</b>

## 2.6 Block D LT Room CO Ventilation Upgrade

General Note: This is an upgrade to the existing system. Fans are 7.5 kw rated. New VSDs allowed for and all installation / Cabling etc.

2.6.1	Master Controller	16	12		1		16	12
2.6.2	Carbon Monoxide Sensors				5			
2.6.3	Cabling Mylar .22 (Roll Installed)				1			
2.6.4	Conduit Galvanised 20mm (meters Installed)				50			
2.6.5	Panel				1			
2.6.6	VSDs Supply And Install				4			
2.6.7	Termination / Programming / Database (Per Point)				28			
2.6.8	Graphic (Per Point)				28			
2.6.9	Relays (If Required)				5			
<b>Total Points Capacity</b>		<b>16</b>	<b>12</b>					<b>28</b>

## 2.7 Block D Level 0 Tunnel

General Note: Controllers to include LCD Displays for local viewing.									
2.7.1	Master Controller	16	12		1		16	12	
2.7.2	Extension Module	12	12		1		12	12	
2.7.3	Termination / Programming / Database (Per Point)				52				
2.7.4	Graphic (Per Point)				52				
2.7.5	Relays (If Required)				10				
<b>Total Points Capacity</b>		<b>28</b>	<b>24</b>					<b>52</b>	

## 2.8 Block B Board Room Units

General Note: Controllers to include LCD Displays for local viewing.

2.8.1	Master Controller	16	12		1		16	12
2.8.2	Extension Module	12	12		1		12	12
2.8.3	Termination / Programming / Database (Per Point)				52			
2.8.4	Graphic (Per Point)				52			
2.8.5	Relays (If Required)				10			
<b>Total Points Capacity</b>		<b>28</b>	<b>24</b>					<b>52</b>

## 2.9 Block A HT/LT Room

General Note: Controllers to include LCD Displays for local viewing.

2.9.1	Master Controller	16	12		1		16	12
2.9.2	Extension Module	24	24		2		12	12
2.9.3	Termination / Programming / Database (Per Point)				76			



2.9.4	Graphic (Per Point)				76			
2.9.5	Relays (If Required)				10			
<b>Total Points Capacity</b>		<b>40</b>	<b>36</b>					<b>76</b>

## 2.10 Auditorium Ground Unit And Lecture Halls

General Note: Controllers to include LCD Displays for local viewing.

2.10.1	Master Controller	16	12		1		16	12
2.10.2	Extension Module	24	24		2		12	12
2.10.3	Termination / Programming / Database (Per Point)				76			
2.10.4	Graphic (Per Point)				76			
2.10.5	Relays (If Required)				10			
<b>Total Points Capacity</b>		<b>40</b>	<b>36</b>					<b>76</b>

## 2.11 Auditorium Roof Unit And Ventilation Fans

General Note: Controllers to include LCD Displays for local viewing.

2.11.1	Master Controller	16	12		1		16	12
2.11.2	Extension Module	24	24		2		12	12
2.11.3	Termination / Programming / Database (Per Point)				76			
2.11.4	Graphic (Per Point)				76			
2.11.5	Relays (If Required)				20			
<b>Total Points Capacity</b>		<b>40</b>	<b>36</b>					<b>76</b>

## 2.12 PRD Controls

General Note: Controls to be swopped out from LON type to BACnet. Damper controls are PAT

2.11.1	PTU 208	96	128		16		6	8
2.11.3	Termination / Programming / Database (Per Point)				224			
2.11.4	Graphic (Per Point)				224			
2.11.5	Relays (If Required)				4			
<b>Total Points Capacity</b>		<b>96</b>	<b>128</b>					<b>224</b>
<b>Bill Of Quantities Subtotal</b>								

Schedule 3 - Integration				
Item	Description	Unit Cost	BOQ Total	Total Cost
<b>3.1 Generators</b>				
General Note: To integrate to existing 2 of Deep Sea Controllers. Block A via modbus remote terminal unit (RTU). Block D generator Deep sea to be replaced with model that supports modbus RTU. IDC 2 Lovato controller installed - integrate via Modbus RTU. Gateway to Modbus transmission control protocol (TCP) to be supplied.				
3.1.1	Gateway		3	
3.1.2	Termination / Programming / Database (Per Point)		75	
3.1.3	Graphic (Per Point)		75	
<b>3.2 Remote UPS</b>				
General Note: Connect the 6 of remote offices' UPS back to the server via SNMP. UPS exists on corporate IP network				
3.1.2	Termination / Programming / Database (Per Point)		90	
3.1.3	Graphic (Per Point)		90	
<b>3.2 Electrical Meters</b>				
General Note: 22 Elster meters to be fitted with modbus RTU cards. Modbus Cabling to be installed				
3.2.1	Elster Cards		22	
3.2.2	Cabling Mylar .22 (Roll Installed)		1	
3.2.2	Termination / Programming / Database (Per Point)		330	
3.2.3	Graphic (Per Point)		330	

<b>3.3 Fire Panel</b>				
General Note: Zyton Fire system to be integrated to the BMS via gateway. Monitoring of common alarms on panels				
3.3.1	Gateway		1	
3.3.2	Termination / Programming / Database (Per Point)		80	
3.3.3	Graphic (Per Point)		80	
<b>3.4 Danfoss VSDs</b>				
General Note: There are a number of Danfoss VSDs that are connected to the current BMS via N2 protocol that need to be integrated to the system				
3.4.1	IDC 1		28	
3.4.2	IDC 2		40	
<b>3.5 Deman Diffuser Controllers</b>				
General Note: There are a number of Deman Diffuser controllers that are connected to the current BMS via LON protocol that need to be integrated to the system				
3.5.1	IDC 1		240	
3.5.2	IDC 2		286	
<b>Bill Of Quantities Subtotal</b>				

BMS Upgrade Total Cost		
Schedule	Description	Total Cost
1	<i>BMS And Network</i>	
2	<i>Controls</i>	
3	<i>Integration</i>	
	<i>P &amp; G's</i>	
		<i>Total</i>

## 8.2 MAINTENANCE COSTS

**Table A: IDC 1 (Main Building)**

ITEM	Activity Description	Monthly Service Cost	Annual Total Service Cost
1	Maintenance of BMS -Year 1		
2	Maintenance of BMS -Year 2		
3	Maintenance of BMS -Year 3		
<b>SUB TOTAL Table A (EXCL VAT)</b>			

**Table B: IDC 2 (Esterhuyzen House)**

ITEM	Activity Description	Monthly Service Cost	Annual Total Service Cost
1	Maintenance of BMS Year 1		
2	Maintenance of BMS -Year 2		
3	Maintenance of BMS -Year 3		
<b>SUB TOTAL Table B (EXCL VAT)</b>			

**Note: The monthly service cost must include all cost associated with the service e.g. technician on site, scheduled preventative maintenance, Call-outs during and after office hours which includes all senior staff and members and should include stated service levels for critical and non-critical call-outs.**

## 8.3 SUPPLY OF EQUIPMENT AND PARTS (AD-HOC BASIS)

The preferred bidder will be required to supply and deliver equipment on a need basis (ad-hoc) for the currently installed items as listed hereunder. For evaluation purposes, bidders are required to provide prices for the following items. The quantities reflected below are only estimates based on the current trends. **Prices must be valid for the first 12 months of the duration of the contract.**

**Table C: CURRENT INSTALLED EQUIPMENT BASE FOR WHICH MAINTENANCE AND PARTS MAY BE REQUIRED DURING THE MAINTENANCE PERIOD**

Device	Model	QTY	Unit Price (VAT Excl.)	Total Price (VAT Excl.)
Temperature Sensors	TS9100-8212	3		
Temperature Sensors	TS9100-8104	3		
Humidity Sensor	HT9000	2		
Static Air Pressure Sensors	694,9122	4		
Air Pressure Switch	604,9	3		
Valve Actuator	VA7200	2		
Valve Actuator	VA1125-GGA	2		
Damper Actuator	GM24A-SR	2		
Damper Actuator	NM24A-SR	2		
Room Temperature Sensor	RS1100	3		
Room Temperature Sensor	RS9190	3		
ROOM TEMP & HUMIDITY (2 In 1) - TEMP	HT9001-URW	1		
ROOM TEMP & HUMIDITY (2 In 1) - HUMIDITY	HT9001-URW	1		
Liquid Level Controller	LV1	2		
<b>SUB TOTAL Table C (EXCL VAT)</b>				

#### 8.4 SUMMARY OF COSTS

Cost Element			Total Cost (VAT Excl.)
<b>BMS Upgrade</b>	<b>Sub-total A</b>	<b>Replacement Of BMS (ONCE-OFF COST)</b>	
<b>Preventative Maintenance Cost</b>	<b>Sub-total B</b>	<b>Preventative Maintenance: IDC1</b>	
	<b>Sub-total C</b>	<b>Preventative Maintenance: IDC2</b>	
<b>Supply of Equipment and Parts</b>	<b>Sub-total D</b>	<b>Estimated Equipment &amp; Parts</b>	
<b>Total Bid Price for one Year (A+B+C+D) (VAT Excl.)</b>			

**Note: Supplier must provide the name and brand of BMS system proposed with detailed technical specification and documentation.**

**8.5 ADHOC SERVICES: COSTING FOR WORK THAT DOES NOT FALL UNDER MAINTENANCE CONTRACT**

The IDC may request the Contractor to perform additional repair work, construction, installation or commissioning which does not form part of this contract. On acceptance of this work by the Contractor, the following information is required and will form the basis to price the additional work. All additional work shall be requested in writing by the IDC (all costs exclusive of VAT).

**Transport Cost:**

Description	Rate
Rate per km	

**Fees:**

Description	Fee (Normal Working Hours (07h00 to 16h00)	Fee Week After Hours
Call-out	R	R
Installations Technician	R	R
Service Technician	R	R
Engineering & Control Programming	R	R
BMS Data Generation/Graphics Technician	R	R

Description	Fee (Saturday Working Hours)	Fee (Sunday Working)
Call-out	R	R
Installations Technician	R	R
Service Technician	R	R
Engineering & Control Programming	R	R
BMS Data Generation/Graphics Technician	R	R



**Materials purchased by contractor**

<b>Amount</b>	<b>Nett Cost to Contractor Plus %Mark-up</b>
Above R10 000	
R10 000-R5 000	
R5 000 - R1 000	
Less than R1 000	

**Price Declaration Form**

Dear Sir,

Having read through and examined the Request for Proposal (RFP) Document, RFP no. T29/09/18, the General Conditions, and all other Annexures to the RFP Document, we offer to replace and maintain the IDC's building management system as stated in Section 3 of this RFP document.

**R..... (Excluding VAT)**

**In words**

**R..... (Excluding VAT)**

We confirm that this price covers all activities associated with the service, as called for in the RFP document. We confirm that IDC will incur no additional costs whatsoever, other than in respect of VAT, over and above this amount in connection with the provision of this service.

We undertake to hold this offer open for acceptance for a period of 120 days from the date of submission of offers. We further undertake that upon final acceptance of our offer, we will commence with the provision of the required service when required to do so by the IDC.

We understand that you are not bound to accept the lowest or any offer, and that we must bear all costs which we have incurred in connection with preparing and submitting this bid.

We hereby undertake for the period during which this bid remains open for acceptance, not to divulge to any persons, other than the persons to whom the bid is submitted, any information relating to the submission of this bid or the details therein except where such is necessary for the submission of this bid.

**SIGNED**

**DATE**

\_\_\_\_\_

(Print name of signatory)

Designation

\_\_\_\_\_  
\_\_\_\_\_

**FOR AND ON BEHALF OF:**

COMPANY NAME

Tel No

Fax No

Cell No

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## **SECTION 5: ANNEXURES**

## Annexure 1: Acceptance of Bid Conditions and Bidder's Details

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Request for Proposal No: \_\_\_\_\_

Name of Bidder: \_\_\_\_\_

Authorised signatory: \_\_\_\_\_

Name of Authorised Signatory \_\_\_\_\_

Position of Authorised Signatory \_\_\_\_\_

By signing above the bidder hereby accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on him/her under this RFP.

**[Note to the Bidder: The Bidder must complete all relevant information set out below.]**

### CENTRAL SUPPLIER DATABASE (CSD) INFORMATION

**Bidders are required to be registered on the Central Supplier Database (CSD) of National Treasury. Failure to submit the requested information may lead to disqualification. Bidders are therefore required to submit as part of this proposal both their CSD supplier number and CSD unique registration reference numbers below:**

<b>Supplier Number</b>	
<b>Unique registration reference number</b>	

### BIDDING STRUCTURE

**Indicate the type of Bidding Structure by marking with an 'X':**

<b>Individual Bidder</b>	
<b>Joint Venture/ Consortium</b>	
<b>Prime Contractor with Sub Contractors</b>	
<b>Other</b>	

### REQUIRED INFORMATION

**If Individual Bidder:**

<b>Name of Company</b>	
<b>Registration Number</b>	
<b>Vat registration Number</b>	
<b>Contact Person</b>	
<b>Telephone Number</b>	
<b>Cellphone Number</b>	

<b>If Individual Bidder:</b>	
Fax Number	
Email address	
Postal Address	
Physical Address	

<b>If Joint Venture or Consortium, indicate the following for each partner:</b>	
<b>Partner 1</b>	
Name of Company	
Registration Number	
Vat registration Number	
Contact Person	
Telephone Number	
Cellphone Number	
Fax Number	
Email address	
Postal Address	
Physical Address	
Scope of work and the value as a % of the total value of the contract	
<b>Partner 2</b>	
Name of Company	
Registration Number	
Vat registration Number	
Contact Person	
Telephone Number	
Cellphone Number	
Fax Number	
Email address	
Postal Address	
Physical Address	

Scope of work and the value as a % of the total value of the contract	
---	--

**If bidder is a Prime Contractor using Sub-contractors, indicate the following:**

**Prime Contractor**

Name of Company

Registration Number

Vat registration Number

Contact Person

Telephone Number

Cellphone Number

Fax Number

Email address

Postal Address

Physical Address

**Sub contractors**

Name of Company

Company Registration Number

Vat registration Number

Contact Person

Telephone Number

Cellphone Number

Fax Number

Email address

Postal Address

Physical Address

Subcontracted work as a % of the total value of the contract

## Annexure 2: Tax Compliance Requirements

<b>1. TAX COMPLIANCE REQUIREMENTS</b>		
1.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.		
1.2 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.		
1.3 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.		
1.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS TOGETHER WITH THE BID.		
1.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE PROOF OF TCS / PIN / CSD NUMBER.		
1.6 WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.		
<b>2. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS</b>		
2.1	IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?	<input type="checkbox"/> YES <input type="checkbox"/> NO
2.2	DOES THE BIDDER HAVE A BRANCH IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
2.3	DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
2.4	DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
<p><b>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 1.3 ABOVE.</b></p>		
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:	

## Annexure 3: Supply chain management practices questionnaire

Request for Proposal No: \_\_\_\_\_

Name of Bidder: \_\_\_\_\_

Authorised signatory: \_\_\_\_\_

[Note to the Respondent: The Respondent must complete the information set out below. If the Respondent requires more space than is provided below it must prepare a document in substantially the same format setting out all the information referred to below and return it with Returnable Schedule 2.]

The bidder must complete the following questionnaire.

### Bidder's past supply chain management practices:

Item	Question	Yes	No
3.1	<p>Is the Bidder or any of its directors listed on the South African National Treasury's database 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 South African National Treasury after the <i>audi alteram partem</i> rule was applied).</p>	<p>Yes</p> <input type="checkbox"/>	<p>No</p> <input type="checkbox"/>
	If so, provide particulars:		
3.2	<p>Is the Bidder or any of its directors listed on the Register for Bid Defaulters in terms of section 29 of the <i>Prevention and Combating of Corrupt Activities Act</i> No 12 of 2004?</p> <p>To access this Register enter the National Treasury's website, <a href="http://www.treasury.gov.za">www.treasury.gov.za</a>, click on the icon "Register for Bid Defaulters" or submit your written request for a hard copy of the Register to facsimile number +27123265445.</p>	<p>Yes</p> <input type="checkbox"/>	<p>No</p> <input type="checkbox"/>
	If so, provide particulars:		
3.3	<p>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?</p>	<p>Yes</p> <input type="checkbox"/>	<p>No</p> <input type="checkbox"/>



Item	Question	Yes	No
	If so, provide particulars:		
3.4	Does the Bidder relate to any IDC employee or part of IDC current or past staff (employee) establishment?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
	If so, provide particulars:		
3.5	Was any contract between the Bidder and any organ of state (within the Republic of South Africa or within any foreign territory) terminated during the past five years on account of failure to perform on or comply with the contract?		
	If so, provide particulars:		

I, \_\_\_\_\_ (print name) hereby certify that the information, facts and representations are correct and that I am duly authorized to sign on behalf of the company.

Name of Company: \_\_\_\_\_

Company Registration Number: \_\_\_\_\_

Company VAT Registration Number: \_\_\_\_\_

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

## Annexure 4: Declaration of Interest

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

- the bidder is employed by the state; and/or

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

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

2.1 Full Name of bidder or his or her representative: .....

2.2 Identity Number:.....

2.3 Position occupied in the Company (director, trustee, shareholder<sup>2</sup>): .....

2.4 Company Registration Number: .....

2.5 Tax Reference Number: .....

2.6 VAT Registration Number: .....

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

<sup>1</sup>“State” means –

(a) any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);

- (b) any municipality or municipal entity;
- (c) provincial legislature;
- (d) national Assembly or the national Council of provinces; or
- (e) Parliament.

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

2.7 Are you or any person connected with the bidder 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**

2.9.1 If so, furnish particulars.

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

2.10 Are you, or any person connected with the bidder (i.e. shareholder, partner, director etc.), aware of any relationship (family, friend, other) between any other bidder or any other company and any person employed by the IDC or the dti who may be involved with the evaluation and or adjudication of this bid? **YES / NO**

2.10.1 If so, furnish particulars.

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

2.11 Do you or any of the directors / trustees / shareholders / members of the company have any interest in any other company whether or not they are bidding for this contract? The IDC reserves the right to undertake further background checks on any other company where partners, shareholders or any interested party of the bidder may be involved in and to consider any **YES/NO**

findings in this regard as part of its vetting processes.

2.11.1 If so, furnish particulars:

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

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

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

1. DECLARATION

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

CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 2 and 3 ABOVE IS CORRECT. I ACCEPT THAT IDC MAY REJECT THE BID OR ACT AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....

Signature

.....

Date

.....

Position

Name of bidder

## Annexure 5: Certificate of Independent Bid Determination

---

SBD 9

### CERTIFICATE OF INDEPENDENT BID DETERMINATION

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

---

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

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

**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 consortium<sup>3</sup> will not be construed as collusive bidding.
7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
  - (a) prices;
  - (b) geographical area where product or service will be rendered (market allocation)
  - (c) methods, factors or formulas used to calculate prices;
  - (d) the intention or decision to submit or not to submit, a bid;
  - (e) the submission of a bid which does not meet the specifications and conditions of the bid; or
  - (f) bidding with the intention not to win the bid.
8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.
9. The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
10. I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

.....  
Signature

.....  
Date

.....  
Position

.....  
Name of Bidder

---

<sup>3</sup> Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.



## Annexure 6: Shareholders and Directors Information

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[Note to the bidder: the bidder must complete the information set out below. If the bidder requires more space than is provided below it must prepare a document in substantially the same format setting out all the information referred to below and return it with Returnable Schedule 2.]

### 6.1 Shareholders/ Members

Name of the shareholder	ID Number	Race	Gender	% shares

**Note:** The bidder must also attach the detailed Company/ Group Structure where relevant.

### 6.2 Black Shareholders/ Members as per the B-BBEE Certificate

Name of the shareholder	ID Number	Race	Gender	% shares

<b>Total Black Shareholding % as per the current and valid B-BBEE Certificate</b>	
---	--

**6.3 Directors**

<b>Name of the shareholder</b>	<b>ID Number</b>	<b>Race</b>	<b>Gender</b>

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

CERTIFY THAT THE INFORMATION FURNISHED ABOVE IS CORRECT.

.....  
Signature

.....  
Date

.....  
Position

.....  
Name of bidder



**Table (b) Details of the Technician to be placed on IDC site:**

Name	Position	Role / Duties in this Project	Relevant Project Experience	
			Project description, Client, Project period	Project Cost

**Details of the key personnel of the bidders' proposed project team:**

Name	Position	Role / Duties in this Project	Relevant Project Experience	
			Project description, Client, Project period	Project Cost

## **Annexure 8: BEE Commitment Plan**

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The IDC encourages existing vendors and prospective bidders to support the objectives of B-BBEE and as far as possible strive to improve their B-BBEE contribution status. For bid evaluation purposes, bidders are allocated points in terms of a preference point system based on the B-BBEE Contribution Level status that is in accordance with a valid B-BBEE certificate.

Bidders are therefore required to submit a B-BBEE improvement plan in view of the new B-BBEE Codes of Good Practice. Bidders must indicate the extent to which their ownership, management control, employment equity, preferential procurement and enterprise development will be maintained or improved over the contract period in the event that they are successful in this bid process.

## Annexure 9: Disclosure Statement

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### **Disclosure Statement**

**In terms of the tender condition 8.6, which allows the IDC to conduct background checks on bidders and its shareholders and directors, the IDC hereby requires bidders to provide the following additional information:**

- 9.1 The IDC considers the integrity of its appointed service providers to be of critical importance. The IDC reserves the right to disqualify from further consideration, any bidder whose integrity, based on past conduct (during the 5 years immediately preceding the bid submission date), it considers questionable.
- 9.2 To this end, the IDC requires each bidder to include in its bid, a disclosure statement which details the following (with sufficient information and supporting documentation for the IDC to make its own assessment as to the materiality or seriousness of allegations regarding the bidder's integrity or conduct):
  - 9.2.1 any criminal charges made against the bidder or any of its directors, shareholders or management officials regarding their professional conduct;
  - 9.2.2 any civil proceedings initiated against the bidder or any of its directors, shareholders or management officials regarding their professional conduct; and
  - 9.2.3 any other enquiry or similar proceedings initiated or threatened against the bidder or any of its directors, shareholders or management officials regarding their professional conduct.
- 9.3 Where the bidder is a consortium, the disclosure statement referred to in paragraph 9.2 above must be made separately in respect of each consortium partner
- 9.4 In the event that the bidder's circumstances change, after submission of its bid, in regard to any matter referred to in paragraph 9.2 above or in regard to any matter referred to in its disclosure statement, the bidder must submit a written notification to IDC indicating the nature and extent of such changed circumstances.
- 9.5 The IDC reserves the right to seek such additional information from any bidder, in respect of the disclosure statement referred to in paragraph 9.2 above, as it may, in its sole discretion, determine, whether such information has been requested under this RFP or otherwise, and may require the bidder to make oral presentations for clarification purposes or to present supplementary information, in respect of the disclosure statement if so required by the IDC.
- 9.6 Based on its own assessment of the contents of the bidder's disclosure statement and any publicly available information which is relevant to the contents of such disclosure statement, the IDC will decide whether the bidder's conduct or any allegations relating thereto pose a risk, reputational or otherwise, to the IDC; and if it reaches an adverse conclusion the IDC will in its sole discretion have the right to disqualify a bidder from further participation in the tender process. Disqualification on this ground may be done at any stage in the bid evaluation process prior to contract award.





## **Annexure 10: Local Content Declaration (If Relevant)**

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Bidders are required to assess their product and /or service offering against the designated sector lists as published by the Department of Trade and Industry (the **dti**) and to ensure full compliance to the minimum local content threshold, if relevant, before submitting its response to this tender. The **dti's** latest list of designated sectors can be accessed on:

[http://www.dti.gov.za/industrial\\_development/ip.jsp](http://www.dti.gov.za/industrial_development/ip.jsp).

Is Local Content relevant in terms of any aspect of your proposal: (Yes / No):

\_\_\_\_\_

If Yes: please indicate the relevancy and how your solution complies with the minimum threshold values by completing the below Declaration form:

### **DECLARATION CERTIFICATE FOR LOCAL PRODUCTION AND CONTENT FOR DESIGNATED SECTORS**

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

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

#### **2. General Conditions**

- 2.1. Preferential Procurement Regulations, 2011 (Regulation 9) makes provision for the promotion of local production and content.
- 2.2. Regulation 9.(1) prescribes that in the case of designated sectors, where in the award of bids local production and content is of critical importance, such bids must be advertised with the specific bidding condition that only locally produced goods, services or works or locally manufactured goods, with a stipulated minimum threshold for local production and content will be considered.
- 2.3. Where necessary, for bids referred to in paragraph 1.2 above, a two stage bidding process may be followed, where the first stage involves a minimum threshold for local production and content and the second stage price and B-BBEE.

- 2.4. A person awarded a contract in relation to a designated sector, may not sub-contract in such a manner that the local production and content of the overall value of the contract is reduced to below the stipulated minimum threshold.
- 2.5. The local content (LC) expressed as a percentage of the bid price must be calculated in accordance with the SABS approved technical specification number SATS 1286: 2011 as follows:

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

Where

x is the imported content in Rand

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

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

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

1.6 A bid may be disqualified if –

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

### **3. Definitions**

3.1. **“bid”** includes written price quotations, advertised competitive bids or proposals;

3.2. **“bid price”** price offered by the bidder, excluding value added tax (VAT);

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

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

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

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

(Tick applicable box)

YES		NO	
-----	--	----	--

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

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

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

Currency	Rates of exchange
US Dollar	
Pound Sterling	
Euro	
Yen	
Other	

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

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

(Tick applicable box)

YES		NO	
-----	--	----	--

5.1. If yes, provide the following particulars:

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

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

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

**LOCAL CONTENT DECLARATION**

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

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

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

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

NB

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

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

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

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

(b) I have satisfied myself that:

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

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

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

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

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

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

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

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

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

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

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

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

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