



T27/04/13

**REQUEST FOR PROPOSAL FOR THE
SUPPLY, INSTALLATION AND
MAINTENANCE OF ADDITIONAL
HEATING EQUIPMENT FOR AIR
CONDITIONING SYSTEMS AT THE IDC**

**NOTE: A NON COMPULSORY BRIEFING
SESSION WILL BE HELD AT THE IDC HEAD
OFFICE IN SANDTON ON THURSDAY,
25 APRIL 2013 AT 10h00**

**CLOSING DATE: TUESDAY, 07 MAY 2013
AT 12:00 NOON**

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SECTION 1: GENERAL CONDITIONS OF BID

1. Proprietary Information

Industrial Development Corporation of SA Ltd (IDC) considers this Tender 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 specification or related information to any third party without the prior written consent of IDC.

2. Enquiries

All communication and attempts to solicit information of any kind relative to this Bid should be channelled to:

Contact person (all technical questions should be in writing)

Name:	<u>Ms Mmaseema Molepo</u>
Telephone Number: Office:	<u>+27 11 269 3977</u>
Fax Number:	<u>+27 86 724 0292</u>
Email address:	<u>mmaseemam@idc.co.za</u>

3. Bid Validity Period

Responses to this tender received from vendors will be valid for a period of 120 days counted from the closing date of the tender.

4. Instructions on submission of Tenders

- 4.1 Tenders should be submitted in duplicate (2 hard copies) all bound in a sealed envelope endorsed, **T27/04/13: Request for proposal for the supply, installation and maintenance of additional heating equipment for air conditioning systems at the IDC**; and one electronic copy (on CD) in PDF format. The sealed envelope must be placed in the tender box at the Main Reception area of the IDC Building, 19 Fredman Drive Sandton by no later than 12:00 noon on Tuesday, 07 May 2013.
- 4.2 Tenders must be submitted in a prescribed response format herewith reflected 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 tender document, the tender description must be endorsed on the delivery note/courier packaging and the courier must ensure that documents are placed / deposited into the tender box. **The IDC will not be held responsible for any delays where tender documents are handed to the IDC Receptionist.**

- 4.5** No tender received by telegram, telex, email, facsimile or similar medium will be considered.
- 4.6** Where a tender document is not in the tender box at the time of the tender closing, such a tender document will be regarded as a late tender. **The IDC reserves the right not to evaluate any late tender response.**
- 4.7** Amended tenders may be sent in an envelope marked “Amendment to tender” and should be placed in the tender 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 tenderer is responsible for all the cost that they shall incur related to the preparation and submission of the tender document.
- 5.3** Tenders submitted by Companies 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 Tender.
- 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 IDC in regard to anything arising from the fact that pages are missing or duplicated.
- 5.5** A list of all references (minimum of 3) must be included in the bid response.
- 5.6** A valid tax clearance certificate must be included in the bid response.
- 5.7** A copy(s) of certificates from the organizations/ bodies that the tenderer is affiliated to must be included in the bid response.

6. Supplier Performance Management

Supplier Performance Management is viewed by the IDC as 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's performance level and ensure effective delivery of service, quality and value-add to IDC's business.

Bidders are 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. IDC's Rights

- 7.1** The IDC is entitled to amend any tender conditions, validity period, specifications, or extend the closing date of tenders before the closing date. All tenderers, to whom the tender documents have been issued, will be advised in writing of such amendments in good time.
- 7.2** The IDC reserves the right not to accept the lowest tender or any tender in part or in whole. It normally awards the contract to the tenderer who proves to be fully capable of handling the contract and whose tender is technically acceptable and/or financially advantageous to the IDC.
- 7.3** The IDC reserves the right to award this tender to a purely empowerment company or may award this tender on condition that a joint venture with an empowerment company is formed. This will be added to the criteria when evaluating the tenders.
- 7.4** The IDC reserves the right to award this tender as a whole or in part without furnishing reasons.
- 7.5** IDC reserves the right at all material times to extend the scope of work relating to this tender to include all or some of the IDC's Subsidiaries. Should this be the case, as a result thereof all the relevant implications will be negotiated between the IDC and the successful tenderer.

8. Undertakings by the Bidder

- 8.1** The bidder hereby offer to render all or any of the services described in the attached documents to the IDC on the terms and conditions and in accordance with the specifications stipulated in this Tender documents (and which shall be taken as part of, and incorporated into, this Proposal at the prices inserted therein).
- 8.2** Tenders submitted by Companies 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 Tender.

- 8.3 The bidder shall prepare for a possible presentation should IDC require such and the tenderer shall be notified thereof no later than 4 (four) days before the actual presentation date.
- 8.4 The bidder hereby agree that the offer herein shall remain binding upon him/her and receptive for acceptance by the IDC during the validity period indicated and calculated from the closing hour and date of the Tender; this Proposal and its acceptance shall be subject to the terms and conditions contained in this tender document.
- 8.5 The bidder furthermore confirm that he/she has satisfied himself/herself as to the correctness and validity of his/her Tender response that the price(s) and rate(s) quoted cover all the work/item(s) specified in the Tender 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.
- 8.6 The bidder hereby accept 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 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:
- 9.1.1 bidders who do not submit a valid and original Tax Clearance Certificate on the closing date and time of the bid;
- 9.1.2 bidders who submitted incomplete information and documentation according to the requirements of this bid document;
- 9.1.3 bidders who submitted information that is fraudulent, factually untrue or inaccurate information;
- 9.1.4 bidders who received information not available to other vendors through fraudulent means; and/or
- 9.1.5 bidders who do not comply with **mandatory requirements** as stipulated in this bid document.

10. Local Production/ Content

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 to set

minimum threshold for local production and content for undesignated sectors.

11. Response Format (Returnable Schedules)

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

11.1 Cover Page: (the cover page must clearly indicate the tender reference number, tender description and the tenderer's name)

11.2 Schedule 1:

- 11.2.1 Executive Summary
- 11.2.2 Company Profile
- 11.2.3 Annexure 1 of this tender document (duly completed and signed)

11.3 Schedule 2

- 11.3.1 Original and Valid tax clearance certificate(s);
- 11.3.2 Certified copies of your CIPRO company registration documents listing all members with percentages, in case of a CC. Or latest certified copies of all share certificates in case of a company;
- 10.3.3 Annexure 2 of this tender document (duly completed and signed);
- 10.3.4 BEE Certificate verified by a SANAS accredited verification agency or a letter from the supplier's auditor (option only for Exempted Micro Enterprises with annual turnover less than R5 million);

Note: If a Consortium, Joint Venture or Subcontractor, the documents listed above (10.3.1-3) must be submitted for each Consortium/ JV member or subcontractor.

11.4 Schedule 3:

- 11.4.1 Response to Section 2 of this document
- 11.4.2 Annexure 4 of this tender document, duly completed and signed (if applicable)

11.5 Schedule 4: Price Proposal (response to Section 3 of this bid document) **(Must be submitted in a separate envelope)**

11.6 One (1) CD with all Schedules listed above

12. Evaluation Criteria and Weightings

Tenders shall be evaluated in terms of the following parameters:

12.1 Technical

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

12.1.1 Mandatory Requirements

All bid responses that do not meet technical mandatory requirements may be disqualified and may not be considered for further evaluation on the Non-Mandatory technical requirements (If applicable).

12.1.2 Non-Mandatory Requirements

With regard to non-mandatory technical requirements, the following criteria and the weightings will be applicable:

ELEMENT	WEIGHT
Bidder's Relevant Experience	30
Proposed Equipment	40
Experience, Skills and Qualifications of the Project Team	20
Industry Affiliations	10
TOTAL	100%

Note: The minimum qualifying score for functionality is 70%. All tenders that fail to achieve the minimum qualifying score on functionality shall not be considered for further evaluation on Price and BEE.

12.2 Preference Point System

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

CRITERIA	POINTS
Price	80
BEE	20
TOTAL	100 points

SECTION 2: TECHNICAL REQUIREMENTS SPECIFICATION

SECTION 2: TECHNICAL REQUIREMENTS SPECIFICATION

1. Special instructions to bidders

- 1.1 Should a vendor have reasons to believe that the requirement Specification is not open and/or is written for a particular brand or product or service provider; the bidder shall notify IDC Procurement within five (5) days after publication of the bid.
- 1.2 Bidders shall provide full and accurate answers to the questions posed in this 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. Failure to comply with Mandatory Requirements may lead to the bidder being disqualified. Mandatory Requirements will include minimum threshold for local content/ production for designated sectors.

2. Background Information

- 2.1 IDC requires proposals for the supply; installation and maintenance of additional heating capacity for the air conditioning systems in 2 of its Head Office buildings namely IDC 1 - Block D & E and IDC2 as per the criteria listed below.

IDC is currently in the process of aligning itself to achieve a green star rating for existing buildings and the installation of additional heating in the form of bar heaters is not an option. The cost of electricity and the responsibility towards reduction instead of increase in electrical consumption warrants the expense of the installation of eco-friendly forms of heating.

2.2 IDC 1 Building – Block D & E

These buildings have three floors which consist of open plan office space, meeting rooms and toilet areas on each floor, with two triple volume atriums areas used as circulation areas.

Cooling Source

These two buildings are supplied by four air handling units. Two of these units have a maximum supply of 8 m³/s of air and the other two 10.1 m³/s. All four units are fitted with variable speed drives and it is estimated that the volume is reduced to around 40% of maximum on cold winter mornings. Fresh air makeup can be reduced to around 10% of total supply. It is calculated that the installed capacity of the supply air fans can handle an additional pressure loss of some 75 Pascal at maximum flow.

These units are currently fitted with finned heaters of 27kW each. The table below reflects the current capacity of the two types of air handling units.

<u>Smaller Units X2</u>	
Air Flow	8.0 m³/s
Cooling Capacity	115 kW
<u>Bigger Units X2</u>	
Air Flow	10.1 m³/s
Cooling Capacity	147 kW

2.3 IDC 2 Level 1; 2; & 3

This building has three floors which consist of open plan office space, meeting rooms and toilet areas on each floor.

This building's air conditioning is supplied by six (6) plant rooms, two on each floor, each fitted with two air handling units. The three sets of plant rooms in the two wings of the building are stacked on top of each other. The air handling units do not have any heating capacity and heating is totally dependent on re-heaters in the diffusers. These heaters are insufficient to heat the building sufficiently in winter; therefore additional heating capacity is required.

3. Scope of Work/ Terms of Reference

3.1 The bidder is required to supply, install and maintain additional heating equipment in each building as follows:

3.1.1 IDC 1 Building – Block D & E

The minimum requirement is an additional 40kW and 30kW of heating for the big units and small units respectively. The heating installed must be able to control in as many steps possible to ensure maximum flexibility. The ideal is infinitely variable between a minimum of 20% and 100% of full capacity.

The bidder's proposal must make provision for Two Options as follows:

- **Option 1:** to install 40kW and 30kW of heating required respectively in the form of eco-friendly heating.
- **Option 2:** The second option is to install 67kW and 57kW of heating required respectively in the form of eco-friendly heating.

The proposed equipment must perform under the following design conditions:-

Minimum Ambient	-5°C
Maximum Ambient	35°C
Minimum Duct Temperature	11°C
Maximum Duct Temperature	22°C
Minimum Airflow, Smaller Units	3.2m³/s
Maximum Airflow, Smaller Units	8m³/s
Minimum Airflow, Bigger Units	4m³/s
Maximum Airflow, Bigger Units	10.1m³/s
Maximum additional pressure drop on all units at maximum flow	75Pa

3.1.2 IDC 2 Level 1; 2; & 3

Installation of additional Heating Capacity in the form of VRV/City Multi or similar in each plant room is required. A heating coil with 16 kW of heating capacity is to be installed in each plant room to pre heat the air before distribution via the existing air handling units. These heating coils can be in the form of a “hide away” units as it will be in the plant room and would just circulate and heat the air in the plant room. The heating capacity of these coils must be variable in the form of a three speed fan. As the plant rooms are on top of each other it is possible to install two outdoor units with sufficient capacity to individually supply the “stack” of 3 plant rooms. The two outdoor units can either be installed on the roof above each stack or in the basement of the building which would also lead to longer pipe runs. Ideally the heating capacity must be infinitely variable between 20% and 100% of capacity.

3.2 Specific Requirements

- All equipment supplied and installed must comply with the applicable South African National Standards (SANS) requirements and good engineering practices.
- The equipment must include a 12-month warranty.
- The bidder will be required to maintain/ service the equipment in accordance with the manufacturer's specifications for a period 12 months
- The equipment must be integrated into the current Metasys Building Management System (BMS) and therefore the controls of the equipment must be compatible with BMS. Note: The IDC BMS contractor would incorporate the controls into the current BMS based on the control parameters supplied by the contractor.
- The insulation must comply with the relevant SANS specifications. All damages to water proofing/equipment will be for the account of the contractor.
- The bidder must make provision for performance tests for the installed equipment. These tests would involve measurement of relevant volumes of air with the resulting increase in air temperature as well as pressure drops over the installed

equipment. Calculations to prove compliance with the required capacities or recommended capacities would be required.

- The bidder must allow for the complete installation including the supply and installation of all required electrical supplies from the relevant distribution boards.
-

3.3 Bidder's proposed solution

The bidder's proposal must provide for the following:

- Relevant manufacturer's detailed specifications for each equipment proposed. It is essential that the co-efficient of performance of the suggested equipment is clearly stated. This will be tested during the required performance test.
- Detailed installation and operation manuals must be supplied.
- The delivery lead time of the proposed equipment as well as program (work schedule) of installation and commissioning.
- Detailed Maintenance schedule (clearly indicating service intervals) for the period of 12 months.

3.4 As-Built Drawings

As-built drawings for the Electrical and Air-conditioning installation must be provided by the bidder after installation. "As Built" drawings are the drawings embodying all modifications made and equipment installed during construction. Detailed installation and operation manuals must be supplied.

4. Project Timelines

The bidder must order the equipment immediately after the tender award and the installation must be completed within a period of one (1) month from the date of receiving the equipment.

5. Technical Evaluation Criteria

5.1 Mandatory Technical Requirements

5.1.1 Green Star Requirements - Refrigerants	Comply	Not Comply
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<p>All refrigerants used in the proposed solution must have an Ozone Depletion Potential (ODP) of zero and Global Warming Potential (GWP) of less than 10</p> <p>The bidder must provide written confirmation that all refrigerants are as per specification above. The confirmation should include manufacturer's datasheets.</p>		
Substantiate / Comments		

5.1.2 Green Star Requirements - Insulation	Comply	Not Comply
<p>All thermal insulation shall have no ozone-depleting substances associated with either the manufacturer or composition of the product. Fibre based woven insulation products (e.g. glass fibre, mineral wool, polyester etc.) and foil insulation which are not manufactured using blowing agents may be used.</p> <p>The Contractor is to provide written confirmation that all proposed insulation materials is as per specification above. Contractor is also to provide manufacturer's data sheets for each Insulation product.</p>		
Substantiate / Comments		

5.1.3 CIDB	Comply	Not Comply
<p>The bidder must have a minimum CIDB Grading Level of 3ME.</p> <p>The bidder must provide proof of their CIDB registration at the required level.</p>		
Substantiate / Comments		

5.2 Non-Mandatory Technical Requirements

5.2.1 Bidder's Relevant Experience	Comply	Not Comply
<p>The bidder must have experience in installing and maintaining Heating, Ventilation and Air-Conditioning (HVAC) systems.</p> <p>The bidder must provide three (3) references of previous projects where similar work has been done in the past ten (10) years; and two (2) references of current contracts. Please refer to Annexure 3 of this document for the format in which the required formation must be provided.</p>		
Substantiate / Comments		

5.2.2 Proposed Equipment – IDC 1	Comply	Not Comply
<p>The proposed equipment must meet the requirements stated above.</p> <p>The following must be provided:</p> <ul style="list-style-type: none"> • Detailed specifications of the proposed equipment proposed; clearly indicating the co-efficient of performance (COP). • Can the equipment perform under the design conditions indicated above. • The rationale for the proposed equipment i.e. value-add to the IDC. • Warranty terms. • The delivery lead time of the proposed equipment as well as program (work schedule) of installation and commissioning. • Detailed Maintenance schedule (clearly indicating service intervals) for the period of 12 months. 		
Substantiate / Comments		

5.2.3 Proposed Equipment – IDC 2	Comply	Not Comply
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<p>The proposed equipment must meet the requirements stated above. The following must be provided:</p> <ul style="list-style-type: none"> • Detailed specifications of the proposed equipment proposed; clearly indicating the co-efficient of performance (COP). • The rationale for the proposed equipment i.e. value-add to the IDC. • Warranty terms. • The delivery lead time of the proposed equipment as well as program (work schedule) of installation and commissioning. • Detailed Maintenance schedule (clearly indicating service intervals) for the period of 12 months. 		
Substantiate / Comments		

5.2.4 Experience, Skills and Qualifications of the Project Team	Comply	Not Comply
<p>The proposed project team (installation and maintenance team) must have relevant skills to deliver the project; comprising of accredited practitioners registered with the South African Qualification and Certification Committee (SAQCC) for Gas.</p> <p>The bidders must submit, as part of its proposal, the following:</p> <ul style="list-style-type: none"> • The structure and composition of the proposed team, clearly outlining their roles/ responsibilities within this project. Please refer to Annexure 3 for a response format. • CVs of the key project team members; and the CVs must clearly highlight the areas of experience/ competence relevant to the tasks and objectives of the assignment as outlined above. • Proof of competency i.e. training/ qualification certificates and proof registration with SAQCC. 		
Substantiate / Comments		

5.2.5 Industry Affiliate	Comply	Not Comply
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<p>The bidder must be registered with relevant industry associations e.g. South African Institute of Refrigeration and Air Conditioning (SAIRAC); South African Refrigeration and Air Conditioning Contractors Association (SARRACA).</p> <p>The bidder must provide certificates as proof of registration/affiliation to the relevant industry associations.</p>		
<p>Substantiate / Comments</p>		

SECTION 3: PRICE PROPOSAL

SECTION 3: Cost Proposal

- 1 Please indicate your total bid price here: R..... (compulsory)
- 2 **NOTE: All prices must be VAT exclusive and must be quoted in South African Rand (ZAR).**
- 3 Are the rates quoted firm for the full period of the contract?

YES	NO
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Important: If not firm for the full period, provide details of the basis on which adjustments shall be applied e.g. CPI, and also details of the cost breakdown.

- 4 The following exchange rates as per SARB on 19/04/2013 at 10:30 must be used (where applicable):

R 9.15 = 1 US dollar

R14.05 = 1 Pound

R11.97 = 1 Euro

5

The bidder must indicate CLEARLY which portion of the bid price is linked to the exchange rate.	Comply	Not Comply
Substantiate / Comments		

6

All additional costs must be clearly specified and included in the total bid price.	Comply	Not Comply
Substantiate / Comments		

7

Payments will be linked to specified deliverables after such deliverables have been approved by the IDC.	Comply	Not Comply
Substantiate / Comments		

8 COSTING MODEL

8.1 IDC 1

8.1.A Equipment

Option 1

Description		Quantity	Unit Price (VAT Excl.)	Total Price (VAT Excl.)
Heating Capacity	Bidder's Proposal			
40kW		2		
30kW		2		
Sub-Total (8.1.A) – Option 1				

Note: This Sub-Total (for Option 1) must be used to calculate Total Bid Price.

Option 2

Description		Quantity	Unit Price (VAT Excl.)	Total Price (VAT Excl.)
Heating Capacity	Bidder's Proposal			
67kW		2		
57kW		2		
Sub-Total (8.1.A) – Option 2				

8.1.B Services

Activity/ Deliverable	Resource(s)	Rate/Hour per resource	Number of hours	Cost (VAT Excl.)
Installation (including integration to BMS)				
Maintenance (for 12 months)				
Disbursements				
Other Costs				
Sub-Total (8.1.B) (VAT Excl.)				

Note: Disbursements and Other Costs must be clearly defined (outlining all assumptions) and a detailed breakdown thereof must be provided.

Total Price for IDC 1 (VAT Excl.)	
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Note: Total Price to be based on Option 1 pricing.

8.2 IDC 2**8.2.A Equipment**

Description		Quantity	Unit Price (VAT Excl.)	Total Price (VAT Excl.)
Heating Capacity	Bidder's Proposal			
48kW		2		
Sub-Total (8.2.A)				

8.2.B Services

Activity/ Deliverable	Resource(s)	Rate/Hour per resource	Number of hours	Cost (VAT Excl.)
Installation (including integration to BMS)				
Maintenance (for 12 months)				
Disbursements				
Other Costs				
Sub-Total (8.2.B) (VAT Excl.)				

Note: Disbursements and Other Costs must be clearly defined (outlining all assumptions) and a detailed breakdown thereof must be provided.

Total Price for IDC 2 (VAT Excl.)	
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TOTAL BID PRICE – IDC 1 + IDC 2 (VAT EXCL.)	
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Price Declaration Form

Dear Sir,

Having read through and examined the Request For Proposal (RFP) Document, RFP no. **T27/04/13** the General Conditions, The Requirement and all other Annexures to the RFP Document, we offer to supply, install and maintain heating equipment for the air-conditioning system at the following total amount (including escalation fees):

R..... (Excluding VAT)

In words

R.....(Excluding VAT)

We confirm that this price covers all activities associated with the project management and consulting service, as called for in the Tender document. We confirm that IDC will incur no additional costs whatsoever 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 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 tender.

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

SIGNED

DATE

(Print name of signatory)

Designation

FOR AND ON BEHALF OF: COMPANY NAME

Tel No

Fax No

Cell No

SECTION 4: ANNEXURES

Annexure 1 – Acceptance of Bid Conditions and Bidder's Details

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 agreement as the Principal(s) liable for the due fulfilment of this contract.

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

BIDDING STRUCTURE

Indicate the type of Bidding Structure by marking with an 'X':	
Individual Bidder	
Joint Venture/ Consortium	
Sub Contractors	
Other	

REQUIRED INFORMATION

If Individual Bidder:	
Name of Company	
Registration Number	
Vat registration Number	
Contact Person	
Telephone Number	
Fax Number	
Email address	
Postal Address	
Physical Address	

If Joint Venture or Consortium, indicate the following for each partner:	
Partner 1	
Name of Company	
Registration Number	
Vat registration Number	

Contact Person	
Telephone Number	
Fax Number	
Email address	
Postal Address	
Physical Address	
Partner 2	
Name of Company	
Registration Number	
Vat registration Number	
Contact Person	
Telephone Number	
Fax Number	
Email address	
Postal Address	
Physical Address	

If using sub-contractors, indicate the following:	
Prime Contractor	
Name of Company	
Registration Number	
Vat registration Number	
Contact Person	
Telephone Number	
Fax Number	
Email address	
Postal Address	
Physical Address	
Sub contractors	
Name of Company	

Company Registration Number	
Vat registration Number	
Contact Person	
Telephone Number	
Fax Number	
Email address	
Postal Address	
Physical Address	

Annexure 2 - Supply chain management practices questionnaire

Request for Proposal No: _____
 Name of Respondent: _____
 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 Respondent must complete the following questionnaire.

Respondent's past supply chain management practices:

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

Item	Question	Yes	No
3.4	Was any contract between the Respondent 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?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
	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 3: Response Format for Section 2 Bidder's Experience and the proposed Project Team

Request for Proposal No: _____

Name of Respondent: _____

Authorised signatory: _____

[Note to the Bidder: The bidder must complete the information set out below in response to the requirements stated in Section 2 of this bid document. 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 the Returnable Schedule 3.]

The bidder must provide the following information:

(a) Details of the bidder's current and past (over the past ten years) projects of similar type, size and complexity to the required services set out in Section 2 of this document:

[illegible]

(b) Details of the bidder's proposed project team:

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

Annexure 4: Declaration Form for Local Content

SBD 6.2

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)].

1. General Conditions

- 1.1. Preferential Procurement Regulations, 2011 (Regulation 9) makes provision for the promotion of local production and content.
- 1.2. 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.
- 1.3. 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.
- 1.4. 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.
- 1.5. 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%20development/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.

2. Definitions

- 2.1. **“bid”** includes written price quotations, advertised competitive bids or proposals;
- 2.2. **“bid price”** price offered by the bidder, excluding value added tax (VAT);
- 2.3. **“contract”** means the agreement that results from the acceptance of a bid by an organ of state;
- 2.4. **“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;
- 2.5. **“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).
- 2.6. **“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;
- 2.7. **“local content”** means that portion of the bid price which is not included in the imported content, provided that local manufacture does take place;
- 2.8. **“stipulated minimum threshold”** means that portion of local production and content as determined by the Department of Trade and Industry; and

2.9. “**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.

3. **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.

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/industrialdevelopment/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: _____