

**PART A
INVITATION TO BID**

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE DEPARTMENT OF HOME AFFAIRS					
BID NUMBER:	DHA14-2025	CLOSING DATE:	21 AUGUST 2025	CLOSING TIME:	11H00
DESCRIPTION	THE APPOINTMENT OF A SERVICE PROVIDER TO MANAGE THE REPOSITIONING ENTERPRISE PEROGAMMME MANAGEMENT OFFICE (PMO) AND PROVIDE PROJECT MANAGEMENT (PM) AND SPECIALIST SERVICES FOR THE DEPARTMENT OF HOME AFFAIRS (DHA) FOR A PERIOD 36 MONTHS.				
BID RESPONSE DOCUMENTS MUST BE DEPOSITED IN THE SILVER TENDER BOX SITUATED AT THE MAIN ENTRANCE OF THE BUILDING (STREET ADDRESS)					
Department of Home Affairs					
Cnr. Thabo Sehume and Johannes Ramokhoase Streets, Hallmark Building					
230 Johannes Ramokhoase Street, Pretoria					
0001					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Lettie Makhudu Ngobile Chonco		CONTACT PERSON	Sihle Mthiyane	
TELEPHONE NUMBER	(012) 406 2750 (012) 406 2789		TELEPHONE NUMBER	(012) 406 4353	
E-MAIL ADDRESS	lettie.makhudu@dha.gov.za ngobile.chonco@dha.gov.za		E-MAIL ADDRESS	sihle.mthiyane@dha.gov.za	
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?		<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS					
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE A BRANCH IN THE RSA?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.					

PART B TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:
<p>1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.</p> <p>1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED (NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.</p> <p>1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS 2022, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.</p> <p>1.4. THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).</p>
2. TAX COMPLIANCE REQUIREMENTS
<p>2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.</p> <p>2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.</p> <p>2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.</p> <p>2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.</p> <p>2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.</p> <p>2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.</p> <p>2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."</p>

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

SIGNATURE OF BIDDER:

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

DATE:

INSTRUCTIONS TO BIDDERS

1. THE TENDER DOCUMENTS

Rules for Bidding

- 1.1. The Department is not bound to accept any of the proposals submitted and reserves the right to call for presentations from short-listed bidders before final selection.
- 1.2. The Department reserves the right to terminate this appointment or temporarily defer the work, or any part thereof, at any stage of completion should the Department decide not to proceed with the tender.
- 1.3. The Department also reserves the right to appoint any other person to undertake any part of the tasks.
- 1.4. The service provider must be a single legal entity with all other necessary expertise secured via sub-contract, or under a joint venture or a consortium arrangement. The Department will enter into a single contract with a single entity for the delivery of the work set out in these tender documents.
- 1.5. The bidding entity shall be the same entity that will execute the bid. Any bid found to be fronting for another entity or entities shall be disqualified immediately.
- 1.6. All South African firms submitting bids as part of a consortium or joint venture must submit valid original tax clearance certificates.
- 1.7. All bidders submitting bids as part of joint venture, consortium, **must** submit the following:
 - i. A Joint Venture, Consortium or Trust agreement signed by all companies forming a Joint Venture, Consortium or Trust.
 - ii. A valid tax clearance certificate and/ or pin issued by South African Revenue Services (SARS) for all companies that form part of a Joint Venture, Consortium or Trust.
 - iii. A Central Supplier Database (CSD) Report for all companies that form part of a Joint Venture, Consortium or Trust.
 - iv. A consolidated SANAS B-BBEE certificate or a consolidated B-BBEE certificate issued by the Companies and Intellectual Property Commission (CIPC).
 - v. SBD 1, SBD 3, SBD 4, & SBD 6 forms must be completed using the Joint Venture, Consortium or Trust information or the lead partner as indicated on the Joint Venture, Consortium or Trust agreement.
- 1.8. Foreign firms providing proposals must become familiar with local conditions and laws and take them into account in preparing their proposals.
- 1.9. The service provider and its affiliates are disqualified from providing goods, works, and services to any private party to this Agreement, or any eventual project that may result, directly or indirectly from these services.
- 1.10. Firms may ask for clarification on these tender documents or any part thereof up to close of business 1 week before the deadline for the submission of the bids.
- 1.11. The Department reserves the right to return late bid submissions unopened.

- 1.12. Firms may not contact the Department on any matter pertaining to their bid from the time when the bids are submitted to the time the contract is awarded. Any effort by a bidder to influence bid evaluation, bid comparisons, or bid award decisions in any manner, may result in rejection of the bid concerned.
- 1.13. Should the contract between the Department and the service provider be terminated by either party due to reasons not attributable to the service provider, the service provider will be remunerated for the appropriate portion of work completed up to a maximum amount of not more than the total fee bid by the service provider for the appropriate phase of the project during which the appointment was terminated.

Conditions of the Tender

- 1.14. The General Conditions of contract will apply.
- 1.15. The Department will become the owner of all information, documents, programmes, advice, and reports collected and compiled by the service provider in the execution of this tender.
- 1.16. The copyright of all documents, programmes, and reports compiled by the service provider will vest in the Department and may not be reproduced or distributed, or made available in any other way without the written consent of the Department.
- 1.17. All information, documents, programmes, and reports must be regarded as confidential and may not be made available to any unauthorised person or institution without the written consent of the Department.
- 1.18. Bidders shall undertake to limit the number of copies of this document and destroy them in the event of their failure to secure the contract.
- 1.19. The service provider is entitled to general knowledge acquired in the execution of this agreement and may use it, provided that it shall not be to the detriment of the Department.

Processing of the Bidder's Personal Information

- 1.20. All personal information of the Bidder, its employees, representatives, associates, and sub-contractors ("Bidder Personal Information") required under this bid is collected and processed to assess the strength and competitiveness of the proposal. The evaluation and award of the contract shall be conducted following applicable legislation, policies, and standards. The Bidder is advised that Bidder Personal Information may be passed on to third parties to whom DHA is compelled by law to provide such information. For example, where appropriate, DHA is compelled to submit information to the National Treasury's Database of Restricted Suppliers.
- 1.21. All Personal Information collected will be processed under Protection of Personal Information Act (POPIA).
- 1.22. The following persons will have access to the Personal Information that has been collected:
 - a) DHA personnel participating in procurement/award procedures; and
 - b) Members of the public: when the bid is awarded, some of the following information will have to be made available on the National Treasury's e-Tender portal and DHA website:
 - Contract description and bid number
 - Names of the successful bidder(s) and preference points claimed

- The contract price(s) (if possible)
- Contract period
- Names of directors; and
- Date of completion/award

1.23. In signing the bid document, the Bidder consents to the use of its Personal Information for the purposes as specified in the paragraphs above

Cost of Bidding

1.24. The Bidder shall bear all costs associated with the preparation and submission of its bid and the Department, will in no case be held responsible or liable for these costs, regardless of the conduct or outcome of the tender process.

Content of Tender Documents

1.25. The services required, tender procedures and contract terms are prescribed in the tender documents, which include:

- i. Instruction to Bidders;
- ii. Technical Bid;
- iii. Terms of Reference;
- iv. Evaluation Criterion;
- v. Financial Bid;

1.26. The Bidder is expected to examine all instructions, forms, terms, and specifications in the tender documents. Failure to furnish all information required by the tender documents or submission of a bid not responsive to the tender documents in every respect will be at the Bidder's risk and may result in the rejection of the bid.

Clarification of Tender Documents

1.27. The Department will respond in email to any request for clarification of the tender documents which it receives no later than 1 week prior to the deadline for submission of bids prescribed by the Department.

1.28. Briefing session.

Bidders are invited to a non-compulsory virtual (Microsoft Teams) briefing session that will be held as follows:

Date and time: Monday, 04 August 2025 at 14h00 to 15h00.

https://teams.microsoft.com/l/meetup-join/19%3ameeting_M2VmNTAyOTMtNGNjNS00MWM0LTlhMmEtODI1OGUzZGY3NGNI%40thread.v2/0?context=%7b%22id%22%3a%225afed814-43e4-4135-ac14-8bbc853379ef%22%2c%22oid%22%3a%22f35a895d-6f99-444b-b735-39057ab50913%22%7d

Amendment of Tender Documents

- 1.29 At any time prior to the deadline for submission of bids, the Department may, for any reason, whether at its own initiative or in response to a clarification requested by a prospective bidder, modify the tender document by amendment.
- 1.30 All prospective bidders who have received the tender document will be notified of the amendment in writing or by fax, and same will be binding on them.
- 1.31 In order to allow prospective bidders reasonable time in which to take the amendment into account in preparing their bids, the Department, at their discretion, may extend the deadline for the submission of bids.

2. PREPARATION OF BIDS

Language of Bid

- 2.1 The bid prepared by the Bidder, as well as all correspondence and documents relating to the bid exchanged by the Bidder and the Department shall be written in English.

Documents Constituting the Bid

- 2.2 The bid prepared by the Bidder shall comprise the following components:

- a) **Technical Bid, including:**

- i. Invitation to Bid (SBD 1)
- ii. Tax Clearance Certificate
- iii. Bidder's Disclosure (SBD4)
- iv. Preferential Points Claim Forms (SBD 6.1)
- v. General Conditions of contract
- vi. CSD report

- vii. **Letter of Authority**

- The title, name, surname, and position of an authorised person to sign the bidding documents and communicate with the department on behalf of the bidding company.
- The contact details of the authorised person including the telephone number or work cell number and the email address.

- viii. Completed Technical Specification Document

- b) **Financial Bid, comprising:**

- i. Price Schedule & Professional services (SBD 3)
- ii. Preferential points specific goals

Bid Prices

- 2.3 Prices indicated on the Price Schedule shall be the total price of services including, where applicable:
 - All duties and other taxes;

- The price of transportation, insurance, and other costs incidental to the delivery of the services to their final destination;
 - The price of any other incidental services required in terms of the tender deliverables;
- 2.4 Prices quoted by the Bidder shall be fixed during the Bidder's performance of the Contract and not subject to variation on any account.
- 2.5 A bid submitted with a variable price quotation will be treated as non-responsive and rejected.
- 2.6 Prices shall be quoted in South African Rands.
- 2.7 The Department has limited resources and bids must be competitive, with market-related pricing, as this will be one of the deciding factors in the final award of the contract.

Period of Validity of Bids

- 2.8 Bids shall remain valid for 90 days after the closing date of the bid prescribed by the Department. A bid valid for a shorter period shall be rejected by the Department as non-responsive.
- 2.9 In exceptional circumstances, the Department may solicit the Bidder's consent to an extension of the period of validity. The request and the response thereto shall be made in writing. A Bidder may refuse the request. A Bidder granting the request will not be required nor permitted to modify its bid.

Format and Signing of Bid

- 2.10 The Bidder shall prepare one copy of the Technical Bid and Financial Bid separately, clearly marking each "Original Technical Bid" and "Original Financial Bid", as appropriate. **Apart from hard copies, a copy should also be provided on CD or memory stick. In the event of any discrepancy between the two, the original shall govern.**
- 2.11 The original bid shall be typed or written in indelible ink and shall be signed by the Bidder or a person or persons duly authorized to bind the Bidder to the Contract. All pages of the bid, except for un-amended printed literature, shall be initialed by the person or persons signing the bid.
- 2.12 Any interlineations, erasures, or overwriting shall be valid only if they are initialed by the person or persons signing the bid.

Sealing and Marking of Bids

- 2.13 The original and CD or Memory stick of the Technical Bid shall be placed in a sealed envelope clearly marked Technical Bid and the original and CD or Memory stick of the Financial Bid shall be placed in a sealed envelope clearly marked Financial Bid and warning "Do not open with Technical Bid". All the inner envelopes shall then be placed into an outer envelope. The inner and outer envelopes shall be addressed to the following address:

Department of Home Affairs
230 Johannes Ramokhoase Street
Pretoria

0001

- 2.14 The inner envelopes shall also indicate the name and address of the Bidder to enable the bid to be returned unopened in case it is declared late.
- 2.15 If the outer envelope is not sealed and marked as required above, the Department will assume no responsibility for the bid's misplacement or premature opening.
- 2.16 Faxed or emailed bids will not be accepted. **Only hand-delivered bids submitted before the due date and time will be accepted.**

Closing Date of Bids

- 2.17 Bids (Technical and Financial) must be received by the Department at the address specified under clause 2.13 above. In the event of the specified date for the submission of Bids being declared a holiday for the Department, the Bids will be received up to the appointed time on the next working day.
- 2.18 The Department may, at its discretion, extend this deadline for submission of bids by amending the bid documents in which case all rights and obligations of the Department and Bidders previously subject to the deadline will thereafter be subject to the deadline as extended.

Late Bids

- 2.19 Any bid received by the Department after the deadline for submission of bids prescribed by the Department will be rejected and/or returned unopened to the Bidder.

Modification and Withdrawal of Bids

- 2.20 The Bidder may modify or withdraw its bid after the bid's submission, provided that written notice of the modification or withdrawal is received by the Department prior to the deadline prescribed for submission of bids.
- 2.21 The Bidder's modification or withdrawal notice shall be prepared, sealed, marked, and dispatched in accordance with the provisions of this bid. A withdrawal notice may also be sent by fax, followed by a signed confirmation copy, postmarked not later than the deadline for submission of bids.
- 2.22 No bid may be modified subsequent to the deadline for submission of bids.
- 2.23 No bid may be withdrawn in the interval between the deadline for submission of bids and the expiration of period of bid validity specified by the Bidder on the Invitation to Bid form.

3. EVALUATION OF BIDS

Clarification of Bids

- 3.1. During evaluation of bids, the Department may, at its discretion, ask the Bidder for a clarification of its bid. The request for clarification and the response shall be in writing.

Preliminary Examination

- 3.2. The Department will examine the bids to determine whether they are complete, whether they meet all the conditions of the Contract and Technical Specifications and whether any computational errors have been made, whether the documents have been properly signed, and whether the bids are generally in order.
- 3.3. Arithmetical errors will be rectified on the following basis. If there is a discrepancy between the unit price and the total price that is obtained by multiplying the unit price and quantity, the unit price shall prevail and the total price shall be corrected. If there is a discrepancy between words and figures, the amount in words shall prevail. If the supplier does not accept the correction of errors, its bid may be rejected.
- 3.4. If a bid is not responsive and not fulfilling all the conditions of the Contract and not meeting Technical Specifications, it will be rejected by the Department and may not subsequently be made responsive by the Bidder by correction of the non-conformity.

Evaluation and Comparison of Bids

- 3.5. The Department will evaluate and compare the financial bids only of those Bidders whose Technical Bid has been accepted by the Department.
- 3.6. The Department's evaluation of a financial bid will take into account information to be provided on the SBD 3.

Contacting the Department

- 3.7. Subject to clause 3.1 above, no Bidder shall contact the Department on any matter relating to its bid, from the time of the bid opening to the time the Contract is awarded. If the bidder wishes to bring additional information to the notice of the Department, it should do so in writing.
- 3.8. Any effort by a Bidder to influence the Department in its decisions on bid evaluation, bid comparison or contract award may result in rejection of the Bidder's bid.

4. AWARD OF CONTRACT

Post qualification

- 4.1. The Department will determine to its satisfaction whether the Bidder that is selected as having submitted the highest evaluated responsive bid meets the criteria specified in these documents, and is qualified to perform the contract satisfactorily.

- 4.2. The determination will take into account the Bidder's financial, technical and production capabilities. It will be based upon an examination of the documentary evidence of the Bidder's qualifications submitted by the bidder, as well as such other information as the Department deems necessary and appropriate.
- 4.3. An affirmative determination will be a prerequisite for award of the Contract to the Bidder. A negative determination will result in rejection of the Bidder's bid, in which event the Department will proceed to the next highest evaluated bid to make a similar determination of that Bidder's capabilities to perform the contract satisfactorily.

Department's right to vary Quantities at Time of Award

- 4.4. The Department reserves the right at the time of Contract award to increase or decrease the quantity of the services originally specified in the Terms of Reference without any change in unit price or other terms and conditions.

Department's right to accept or reject any or all Bids

- 4.5. The Department reserves the right to:
 - Accept or reject all or individual items of this bid;
 - Accept one or more bids submissions reject individual items;
 - Request clarification or further information regarding any item in the Proposal;
 - Request further information from any bidder after the closing date;
 - Accept a bid that may not reflect the lowest pricing;
 - Consider any bid that may not conform to any aspect of this bid;
 - Annul the tender process and reject all bids at any time prior to contract award;
 - Consider such alternate services, terms or conditions that may be offered, whether such offer is contained in a Proposal or otherwise;
 - Award the contract or any part thereof to one or more bidders; without thereby incurring any liability to the affected Bidder or bidders.

Notification of Award

- 4.6. Prior to the expiration of the period of bid validity, the Department will notify the successful bidder in writing by registered letter or by fax, to be confirmed in writing by registered letter, that its bid has been accepted.
- 4.7. The notification of award will constitute the formation of the Contract.

Signing of Contract

- 4.8. At the same time as the Department notifies the successful bidder that its bid has been accepted, the Department will send the bidder the Contract Form provided in the tender documents, incorporating all agreements between the parties.

- 4.9. Within 2 days of receipt of the Contract Form, the successful bidder shall sign and date the Contract Form and return it to the Department.

Termination of Service

- 4.10. In case of any failure to comply with any of the conditions of the contract or unsatisfactory rendering of service, the stipulation of the General Conditions of Contract and the Special Conditions of Contract, shall be applicable.
- 4.11. Should the Department, after a reasonable period of notice, of not less than seven days, in writing, depending upon the circumstances, call upon the service provider to comply with any of the conditions and should he/she fail to do so, the Department shall, without prejudice to any of its rights be entitled to cancel the contract, and to claim from the service provider any damage or loss that might have been suffered, including any additional expense incurred by it having either to invite fresh bids or to accept any less favourable bid.

Unsatisfactory Performance

- 4.12. Failure to comply with the conditions of the contract, the Department shall be entitled, without prejudice to its other rights, to cancel the contract in terms of the General Conditions of Contract. Delays beyond time limits and timeframes agreed upon between the parties. Failure to meet the performance standards indicated in the contract

Assignment

- 4.13. The contractor shall not, without prior written authority of the Department, cede, assign or transfer its rights or obligations in respect of this contract or any part thereof or any share of interests herein, directly or indirectly, to any person, firm or organization whatsoever.



home affairs

Department:
Home Affairs
REPUBLIC OF SOUTH AFRICA

TERMS OF REFERENCE

DHA14-2025

THE APPOINTMENT OF A SERVICE PROVIDER TO MANAGE THE REPOSITIONING ENTERPRISE PROGRAMME MANAGEMENT OFFICE (PMO) AND PROVIDE PROJECT MANAGEMENT (PM) AND SPECIALIST SERVICES FOR THE DEPARTMENT OF HOME AFFAIRS (DHA) FOR A PERIOD OF 36 MONTHS.

CLOSING DATE AND TIME OF BID:

21 August 2025 at 11h00

Bidders are invited to a non-compulsory virtual (Microsoft Teams) briefing session that will be held as follows:

Date and time: Monday, 04 August 2025 at 14h00 to 15h00

Link to the virtual meeting

https://teams.microsoft.com/join/19%3ameeting_M2VmNTAyOTMtNGNjNS00MWM0LTlhMmEtODI1OGUzZGY3NGNI%40thread.v2/0?context=%7b%22id%22%3a%225afed814-43e4-4135-ac14-8bbc853379ef%22%2c%22oid%22%3a%22f35a895d-6f99-444b-b735-39057ab50913%22%7d

DISCLAIMER

The Department of Home Affairs (DHA)'s bid documents and tender processes are free of charge. DHA will not call or send any official to demand payment for tender services.

Be advised that all tender notices, bids received, and awards are published on www.dha.gov.za.

The Department requests all suppliers and the business communities out there to be vigilant around matters of procurement and if in doubt, do not hesitate to contact the contact persons on the relevant procurement document or the department.

BID VALIDITY PERIOD: 90 DAYS

Department of Home Affairs

Supply Chain Management

TERMS OF REFERENCE

OBJECTIVES

1. The objectives (aim) of this tender are:
 - To invite bids from suitable service providers for the management of the Repositioning EPMO and provision of related project management and specialist services for a period of thirty-six (36) months.
 - The responsibilities of the Repositioning EPMO will, *inter alia*, include the following:
 - Establishment of a permanent EPMO in line with the digital transformation vision of the Department of Home Affairs (DHA);
 - Identification and prioritisation of programmes and projects that support the implementation of the repositioning programme in line with the 5 year strategic vision of the DHA;
 - Provision of project delivery management services to projects that are either directly or indirectly administered by the EPMO;
 - Ensuring accountability by producing projects performance reports for the attention of the Executive management of the DHA;
 - Institutionalisation of a best practice project management methodology with standardised frameworks, policies, processes and procedures;
 - Capacitation of the EPMO to perform operational and strategic functions;
 - Management of service providers that are appointed to deliver projects that support the implementation of the repositioning programme and strategic vision of the DHA; and
 - Transfer of EPMO, programme and project management skills to the DHA.

BACKGROUND

2. Since 2016 the DHA has embarked on a repositioning programme which seeks to reposition the department as a modern, secure, and efficient department located within the security system of the State so that it can protect its people, data and systems. In March 2017 Cabinet approved the Business Case for repositioning the DHA and subsequently a White Paper on Home Affairs was developed and approved by Cabinet in December 2019. The full mandate of the DHA, grounded on the Constitution, is to manage its functions to empower citizens; enable inclusivity and economic development; be the backbone of a capable State by harnessing technology; and support national security within its mandate.
3. The DHA's mandate, as set out in the Home Affairs White Paper, is to have sole authority in the following functions of the State:
 - Mandate 1: Management of citizenship and civil registration
 - Mandate 2: Management of international migration
 - Mandate 3: Management of refugee protection

4. The department has adopted a phased-implementation plan for the repositioning programme; that is:
 - Three-year horizon (April 2019 – March 2022): The focus is on putting in place key elements of the new DHA model and continuation of the modernisation programme.
 - Five-year horizon (by March 2025): All core elements of the new model are fully functional, including basic administrative and core business systems, and required security standards are maintained. The National Identity System (NIS) is generating substantial revenue through large-scale verification of identity.
 - Ten-year horizon (by March 2029): The envisioned end-state is achieved with the legacy model fully replaced, world-class standards maintained and funding assured.
5. The Repositioning Programme consists of six priority areas which will guide the prioritisation of programmes and projects that support the implementation of the Repositioning Programme. The six priority areas of the repositioning programme are as follows:
 - Policy and Legislation
 - Service Delivery, Operating and Organisational Models
 - Digital Transformation
 - Capable and Developmental Department
 - Revenue Generation
 - Service Delivery Channels and Purpose-Built Office Infrastructure
6. In order to successfully implement the repositioning programme a need for a Programme Management Office (PMO) was identified, leading to the appointment of a service provider for a period of 36 months. The DHA PMO has been operational since March 2021 to provide project management support to project managers, track and monitor all projects that were constituted as being part of the Home Affairs Repositioning Programme. During this period, the Department had several projects that were implemented successfully while some projects are still underway.
7. One of the challenges identified during the implementation of the repositioning PMO is that there are critical initiatives / projects that are required to achieve targets defined in the Strategic Plan, Annual Performance Plan (APP) and Annual Operational Plan (AOP), which fall outside the ambit of the Repositioning PMO. These initiatives do however consume resources and create a conflict of prioritisation which ultimately negatively impacts on overall project delivery and completion within the Department.
8. Moving the PMO to the level of an Enterprise Project Management Office (EPMO) would provide a higher likelihood of the Department successfully managing and completing multiple projects simultaneously, by taking a Departmental wide view to projects and programmes. This also can simplify the work of the project management team while streamlining resource utilisation.

9. The EPMO will operate at a strategic level in collaboration with senior management to ensure projects and portfolio activities are conducted to the benefit of the Department and in fulfilment of the 5-year strategic vision of the Department. The organisational value of the EPMO lies in driving a portfolio management approach, aligned with the organisational strategy and executable plan that will help the organisation achieve its goals.
10. The EPMO will play a critical role in providing project management and technical support for projects that contribute to the digital transformation agenda of the department. The wholesale digital transformation of Home Affairs is the single most important priority, and technical solutions must be found to overcome prevailing challenges. Home Affairs must be transformed into a digital-first department to safeguard national security and enable economic growth. The lack of a modern digital system to process all applications, the adjudication thereof, as well as the communication of outcomes at the DHA is the root cause of the national security threat confronted by the country. Home Affairs systems are vulnerable to fraud, corruption and discretion as they are outdated, antiquated, paper-based, manual and, therefore, open to subversion. The integrity of the national population register and other systems must be protected. The digitisation of paper-based records is a key enabler in this regard.
11. The digital transformation of the Department will require further policy and legislative reforms as well as the new operating and organizational model and organizational culture.

SCOPE AND EXTENT OF THE TENDER

12. The successful bidder(s) will be expected to execute and conduct the following tasks for/ provide the following services / items to the Department:
 - 12.1 The DHA will only appoint and enter into a contractual agreement with one service provider for the services required. The appointed entity will be held fully accountable for the delivery against the full terms of the contractual agreement with the DHA.
 - 12.2 **Enterprise Programme Management Office**

The scope of work for the service provider in respect of the EPMO will involve the following:

 - a) **Situational Analysis:** The analysis will define the DHA's strengths and weaknesses on programme and project management and make recommendations that must be taken to strengthen the department's capacity for managing programmes and projects.
 - b) **Refining of the Project Management methodology with standardised frameworks, policy, processes and procedures:** The DHA PMO goals, missions and visions should be aligned with the greater DHA strategic objectives. The project management methodology, most suited for the kind of projects to be carried out by the PMO, will be further developed, in a tailored and customised way that addresses the needs and practices of the DHA. The processes should be documented in a way that can be readily understood and easily applied by the intended users. A series of orientation sessions will need to be arranged for the personnel to get hands-on practices on how to use the developed methodology, processes, and templates.

- c) **Provide Programme/Project Management Resources and services:** Project Management personnel with relevant programme and project management experience and skills are needed to perform the functions of the DHA PMO and provide project management services for the period of 36 months.
- d) **Skills Development:** The DHA will assign personnel from the department to the EPMO with the purpose of developing their skills and proficiency in managing the PMO. The service provider will be required for the management of this personnel so that they become proficient in the management of the EPMO, programmes and projects. The service provider will also be required to provide the department with progress report on the skilling of the personnel. The service provider will be required to develop a skills transfer plan at the inception of the project. Appropriate training and orientation have to be prepared. It is important that training be conducted based on the selected project management framework/methodology that will be adopted in the PMO so that the personnel will be able to understand and apply the methodology, processes, templates that will be developed for the EPMO operation.
- e) **Organisational Change Management:** The DHA may be faced with resistance from people who will be directly affected by the institutionalisation of a project management culture. To overcome this resistance and to ease such change, key stakeholders will be involved through various governance and senior management structures.
- f) **Business Process Re-engineering (BPR) process:** Central to the repositioning and digital transformation of the DHA is the redesigning and modernisation of the business processes in order to better support implementation of the department's mandate.
- g) **Project management system:** The service provider will be required to propose a Project Management System/ software to be used for the duration of the project.

12.3 Project Governance

- a) Review existing project documentation;
- b) Monitor programme governance in line with approved project methodology;
- c) Measure governance performance per project event calendar;
- d) Facilitate external parties' attendance to governance events as required;
- e) Secretariat role in project governance which includes meeting scheduling and record keeping; as well as distribution of meeting packs.

12.4 Project Operational Meeting

- a) Schedule weekly operational project meetings;
- b) Schedule monthly Steering Committee meetings;
- c) Collate reports from all participating business and functional managers; and
- d) Record and distribute all meeting minutes.

12.5 Project Planning

- a) Facilitation and consolidation of project plans;
- b) Keep plans up-to-date and communicate with all project managers regarding delivery according to plans;
and
- c) Monitor and advise on deviation from plans.

12.6 Project Administration

- a) Project knowledge retention and transfer;
- b) Administrate time keeping; and
- c) Project document management system implementation and maintenance. The project document management system must be an open source and must be available to the department.

12.7 Project Risk and Quality

- a) Facilitate quality assurance and milestone facilitation;
- b) Coordinate risk management and evaluation of risk mitigation within the programme;
- c) Facilitate assurance, audit, assessment, evaluation project events;
- d) Facilitate lessons learnt; and
- e) Facilitate or support customer satisfaction.

12.8 Project Performance Management, Monitoring and Reporting

- a) Provide input into the quarterly and annual performance reports;
- b) Maintain the project operational plan;
- c) Prepare monthly, quarterly and annual performance reports;
- d) Facilitate and consolidate project monitoring and reporting;
- e) Monitor that project methodology is being followed;
- f) Contract management and performance monitoring; and
- g) Perform comprehensive data and trend analysis of hours, costs, resource allocation for historical and forecasting purposes.

12.9 Project Financials

- a) Manage and report project and programme budget and expenditure.
- b) Manage all service providers appointed for specific project deliverables.

SPECIAL CONDITIONS OF CONTRACT

13. To achieve the above, the successful bidder will be required to meet the following requirements:
- The service provider(s) may not recruit or shall attempt to recruit an employee of the Department of Home Affairs for the purposes of preparation of bid or for the duration or the execution of this contract or any part thereof.
 - The successful service provider will be required to meet minimum security clearance standards in line with the Minimum Information Security Standard (MISS).
 - Proof of registration with applicable professional bodies will be required.
 - The successful service provider must be able to provide the following expertise:
 - EPMO Management
 - Portfolio Management and Governance
 - Programme/Project Delivery Management
 - Standards, Methodologies and Processes
 - Skills development on Programme and Project Management
 - Business Process re-engineering
 - Change management
 - The appointed service provider must complete the project within thirty-six (36) months from the date of signing the contract.
 - The successful service provider is expected to sign and comply with confidentiality requirements. Any deviation from the said requirements or any non-compliance may disqualify the service provider from the award of any contract under the auspices of the DHA. Copyright of all documentation relating to the PMO belongs to DHA. The service provider may not disclose any information, documentation to other clients without the written approval by DHA. Therefore, the successful service provider may not publish the PMO work.
 - If at any time during the performance of the services by the appointed service provider encounter conditions impacting on the specific or timely delivery of services as prescribed by this bid or as agreed between the DHA and the appointed service provider, the service provider shall notify the department in writing of the fact, the likely duration and/or its causes. As soon as the receipt of the service provider's notice, the department shall evaluate the situation and may, at its discretion:
 - Extend the service provider's time for performance or opportunity to comply with specifications, with or without the imposition of the penalties;
 - Terminate the contract of the appointed service provider on written notice of fourteen (14) days; and
 - The guideline scope of service and tariffs of fees issued in terms of the government gazette No. 34510 of project management profession will be considered.
 - The DHA reserves the right to call for interviews with short-listed bidders before final selection.
 - The DHA reserves the right to negotiate price with the preferred bidder.

- The service provider will be liable for any form of negligence, noncompliance and changes the scope of the contract.
- The DHA reserve its right to terminate the contract of the service provider in case of unsatisfactory performance.
- Bidders must submit evidence of experience and institutional capability to conduct work of this magnitude.

TENDER DELIVERABLES / OUTPUTS AND TIMEFRAMES

14. The primary deliverables to be achieved:

14.1 Portfolio Management and Governance

Key Deliverables:

- **Establishment of the permanent EPMO** in line with the strategic objectives of the department
- **Strategic Alignment report:** The EPMO will ensure that the repositioning programme and its projects contribute to the achievement of the departmental strategic objectives/outcomes.
- **Portfolio Management Prioritisation criteria:** PMO will establish quantified criteria for the selection, prioritisation and evaluation of projects that support the implementation of the repositioning programme.
- **Portfolio Performance Report:** All projects, which the EPMO will account for, will be regularly monitored and measured for performance using Earned Value (EV) or some other performance calculation methods
- **Governance Processes and Structures:** The EPMO will establish clear governance processes and structures for the selection, approval and reporting of its projects.
- **Benefit realisation report:** All projects will undergo the process of identifying, measuring, and realizing the benefits of a project, including the project's outcomes and ensuring they align with the expected benefits.

14.2 Programme/Project Delivery Management

Key Deliverables:

- **Project Integration Management methodology:** The EPMO must ensure Scope/Schedule/Cost Management for all projects that it will directly or indirectly manage.
- **Schedule of key Resource:** The EPMO will be held accountable for all resources allocated to it to perform its responsibilities. Therefore, a clear Work Breakdown Structure and resource allocation plan must be put in place.
- Stakeholder Management
- **Risk Management register and report:** The EPMO will develop a risk register with mitigation strategies for its projects.
- **Communication Management strategy and report:** The EPMO will be required to keep DHA management and project owners and other relevant stakeholders informed on its projects.

14.3 Standards, Methodologies and Processes

Key Deliverables:

- **Project Management Methods and Practices:**
- Set the DHA Project Management methodology and standards.
- Be the in-house advocate for good Project Management practices within DHA.
- Select Project Management tools for organization-wide use.
- Serve as the official source of project templates and other project support tools, systems and software.
- Establish project repository that provides easy to use project data and project information bank of previous successful and failed projects implemented by the department

14.4 Skills development on Programme and Project Management

Key Deliverables:

- **Skills development plan (skills transferal to DHA employees):** The service provider will be required to develop a skills transfer plan at the inception of the project. The service provider will be required to manage the development of the personnel that will be assigned to it by the department so that they become proficient in the management of the PMO, programmes and projects.
- **Training programme:** It is important that training be conducted based on the selected project management framework/methodology that will be adopted in the PMO so that the personnel will be able to understand and apply the methodology, processes, templates that will be developed for the PMO operation. The PMO will assist project teams in all phases of their projects from project initiation to closeout. It will also train department Project Managers in a full range of Project Management knowledge areas.
- **Training Progress report on quarterly basis:** The service provider will be required to provide the department with quarterly progress reports on the skilling of the personnel

14.5 Change management

Key Deliverable:

- Change management strategy for all repositioning projects

14.6 Re-engineered business processes

Key Deliverable:

- Redesigned and automated business processes

LOGISTICS AND TIMING

- **Project location(s):**
 - The service provider will execute the EPMO functions in the DHA Head Office, 230 Johannes Ramokhoase Street, Pretoria, Gauteng.

- **Expected commencement date:**
 - 01 October 2025
- **Project period:**
 - 36 Months (01 October 2025 - 30 September 2028)
- **Bid proposal**
 - The Service Provider must provide a properly referenced bid proposal in response to this TOR document with clear headings and information required to evaluate the bid against the requirements stipulated in this TOR document.
 - Bid documents may either be submitted through a courier services or hand delivered at the address indicated on SBD 1 form attached on the DHA's tender document.
 - If the bid documents are submitted through a courier services, **it is the responsibility of the bidder to ensure that the documents are inside the silver bid box by the closing time (11h00) and date 21 August 2025.**
 - The Bidders' bid proposal must be submitted at the **Department of Home Affairs 230 Johannes Ramokhoase, Hallmark Building, Pretoria.**
 - Bidder(s) are required to submit two (2) original bid proposal response documents as per **paragraph 2.10** of the tender document under instruction to bidders:
 - ❖ One (1) original technical bid document;
 - ❖ One (1) original financial bid document and;
 - ❖ One (1) compact disc (CD) or universal serial bus (USB) with PDF content of each bid document by the closing date and time. Each bid response document and CD must be marked correctly and sealed separately for ease of reference during the evaluation process. Furthermore, the bid response document and information in the CD or USB must be clearly labelled.
 - The Service Provider is to provide and complete the bid proposal using the following headings:
 - ❖ Introduction
 - ❖ Understanding of the TOR
 - ❖ Methodology and approach
 - ❖ Capacity to deliver by the date specified (with reference to attached evidence)
 - ❖ Timeframes/Project Plan/Budget breakdown/Total bid price (all inclusive).
 - ❖ Quantum and cost of resources and services provided (as per fee structure on page 22 of 41)
 - ❖ Company profile (highlighting relevant past experience)
 - ❖ Indication of capacity and ability to perform the project;
 - ❖ List of similar projects undertaken by the service provider in the past (including the list of references and their contact details); and
 - ❖ List of project team and their experiences;

- **Fee structure**

The service provider will be required to provide a cost breakdown structure in line with the below fee structure guideline

FEE STRUCTURE						
Professional Resource	Hourly Rate (Rands)	Escalation Rate/ annum (%)	Year 1 (Rands)	Year 2 (Rands)	Year 3 (Rands)	TOTAL (Rands)
EPMO Manager						
Project Manager: Project Delivery Management and Methodology						
Project Manager: Property and Facilities Management						
Project Manager: Digital Transformation						
Policy and Legal drafting Specialist						
Project Administrator						
Project Management System inclusive of license/subscription fees per user	N/A					
VAT (15%)						
Total (including escalation rate)						
The Bidder must provide an all-inclusive price including VAT and must complete the SBD 3.3 form. Note: Disbursements will be capped at 10% of the contract amount.						

EVALUATION STAGES

15. The following evaluation process will be followed to evaluate the bids received:

Stage	Description	Applicable for this bid
Stage 1A	Non-compulsory virtual briefing session	Yes

Stage	Description	Applicable for this bid
Stage 1B	Initial screening process / compliance with bid requirements	Yes
Stage 2	Pre-qualification criteria	Yes
Stage 3	Mandatory requirement evaluation	Yes
Stage 4	Functionality requirement evaluation	Yes
Stage 5	Price and special goals	Yes

Stage 1A: Briefing session

- A Non-compulsory briefing session will be held virtually.

Stage 1B: Initial screening process/compliance with bid requirements

- Verification of bidder's compliance with bid requirements.

No.	Compliance Checklist	Yes / No
1.	The bidder is registered on the National Treasury Central Suppliers Database (CSD).	
2.	The bidder is in business (as indicated on CSD).	
3.	The bidder is not a restricted supplier/ or does not have a restricted director(s) (as indicated on CSD).	
4.	The bidder is Tax Compliant (as indicated on CSD) or verified through SARS	
5.	The bidder is not a government employee (as indicated on CSD).	
6.	The bidder completed SBD 1 Form in full together with the letter of authority.	
7.	The bidder completed SBD 4 Form in full and did not reveal any information or past practices that prohibits the supplier from conducting business with the state.	
8.	The bidder completed SBD 6.1 Form in full and must indicate claimed points for each preference point system and attach evidence as per Table 1.	

Stage 2: Pre-qualification criteria

- Service provider(s) must indicate their compliance with the following prequalification criteria as required by the DHA. Bidders who fail to meet the prequalification criteria will be disqualified.
- Only bidders who have complied with prequalification criteria will be evaluated for mandatory.
- Names of the project team and their relevant professional body **Must** be provided and be assigned to portfolios as per the bid specifications.
- The Bidder **Must** complete the tables below and confirm in writing the name and surname of the professional person.

Mandatory requirement		Comply	Do not comply
PROFESSIONAL PERSON	RELEVANT PROFESSIONAL BODY		
EPMO Manager	Valid Registration with a recognised Project Management Professional Body		
Project Manager: Project Delivery Manager and Methodology	Valid Registration with a recognised Professional Body		
Project Manager: Property and Facilities Management	Valid Registration with a recognised Professional Body		
Project Manager: Digital Transformation	Valid Registration with a recognised Professional Body		
Policy and Legal drafting specialist	N/A		
EVIDENCE: Bidders must submit the relevant valid certificates for each Professional person			

Professional Person	Tick { x }	Name and Surname of the Professional Person:
EPMO Manager		
Project Manager: Project Delivery Manager and Methodology		
Project Manager: Property and Facilities Management		
Project Manager: Digital Transformation		
Policy and Legal drafting specialist		

Signature: _____

Date: _____

Stage 3: Mandatory requirements

- Service provider(s) must indicate their compliance with the following mandatory requirement as required by the DHA. Bidders who fail to meet the mandatory requirements will be disqualified.
- Only bidders who have complied with mandatory requirements will be evaluated for functionality.

- The relevant qualifications of the professional person must be indicated on this block as per the names and surnames assigned to portfolios on the Pre-qualification criteria stage 2.

Resources	Minimum Qualification	Comply	Do Not Comply
PMO Manager	NQF 8 relevant Qualification		
Project Manager: Project Delivery Manager	NQF 7 relevant qualification		
Project Manager: Property and Facilities Management:	NQF 7 relevant qualification		
Project Manager: Digital Transformation	NQF 7 relevant qualification		
Policy and Legal drafting Specialist:	NQF 8 legal qualification		

Stage 4: Functionality requirement evaluation

- Bids will be evaluated strictly according to the bid evaluation criteria stipulated in the terms of reference.
- The technical proposal will be evaluated out of 100 points with a minimum threshold of 70 points. Bidders that score less than the minimum of 70 points will be disqualified.
- Bidders must, as part of their bid documents, submit supportive documentation for all technical requirements as indicated hereunder. The panel (Bid Evaluation Committee (BEC)) responsible for scoring the respective bids will evaluate and score all bids based on their submissions and the information provided. Bidders are required to ensure that all information is supplied as required.
- The panel members will individually evaluate the responses received against the following criteria as set out below:

EVALUATION CRITERIA	GUIDELINES FOR CRITERIA APPLICATION	EVIDENCE	WEIGHT
EPMO Programme and Project Management Approach	<p>Bidders must provide a comprehensive project plan that covers an approach in terms of EPMO establishment, programme, and project delivery, change management, project governance and control framework.</p> <ul style="list-style-type: none"> Meets requirements = 20 Below requirements = 10 Significantly below requirements = 5 No relevant information = 0 	<p>Project Plan</p> <p>(The Project plan must demonstrate understanding of the project requirements, knowledge, clear timeframes, and programme resource complement)</p>	20

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EVALUATION CRITERIA	GUIDELINES FOR CRITERIA APPLICATION	EVIDENCE	WEIGHT
Skills development plan	<p>Bidders must include a Skills development plan that is comprehensive and fully responsive to the needs of the DHA</p> <ul style="list-style-type: none"> Meets requirements = 10 Below requirements = 5 Significantly below requirements = 2 No relevant information = 0 	Skills Development Plan with a clear Methodology, timelines and expected outcomes	10
Company Experience in Projects of similar nature (Establishment of EPMO and provision of project management services or similar work)	<p>Experience of the service provider in establishing EPMOs and providing project management services or similar work:</p> <p>Relevant Experience</p> <ul style="list-style-type: none"> 1-3 years' experience = 5 Points 4-5 years' experience = 10 Points 6-10 years' experience = 15 Points 	Bidders must provide contactable reference letters (on client's letterhead) on similar work done.	15
Experience in Projects of similar nature (Establishment of EPMO and provision of project management services.	<p>Experience of the service provider in establishing EPMOs and providing project management services or similar work:</p> <ul style="list-style-type: none"> At least 1 contactable reference letter = 5 Points At least 2 contactable reference letters = 10 Points At least 3 contactable reference letters = 15 Points 	Bidders must provide contactable reference letters that indicates acceptable level of performance (on client's letterhead) on similar work done.	15
Capacity the EPMO Manager	<p>Experience (2-page CV) of the PMO Manager:</p> <ul style="list-style-type: none"> 10 years' (and more) relevant experience with: 20 Points. 7-9 years' relevant experience: 15 Points. 4-6 years' experience relevant: 10 Points 1-3 years' relevant experience: 5 Points No relevant experience: 0 	CV's as per requirements	20
Capacity of Project Team	<p>Experience (2-page CV) of Project Team.</p> <p>Project Manager: Project Delivery Manager and</p>	Attach Project Team qualifications and CV's	20

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EVALUATION CRITERIA	GUIDELINES FOR CRITERIA APPLICATION	EVIDENCE	WEIGHT
	<p>Methodology:</p> <ul style="list-style-type: none"> • 5 years' (and more) relevant experience: 5 Points • 4 years' relevant experience: 4 Points • 3 years' relevant experience: 3 Points • 2 years' relevant experience: 2 Points • 1-year relevant experience: 1 Point • No relevant experience and qualification: 0 <p>Project Manager: Property and Facilities Management:</p> <ul style="list-style-type: none"> • 5 years' relevant experience: 5 Points • 4 years' relevant experience: 4 Points • 3 years' relevant experience: 3 Points • 2 years' relevant experience: 2 Points • 1-year relevant experience: 1 Point • No relevant experience and qualification: 0 <p>Project Manager: Digital Transformation</p> <ul style="list-style-type: none"> • 5 years' relevant experience: 5 Points • 4 years' relevant experience: 4 Points • 3 years' relevant experience: 3 Points • 2 years' relevant experience: 2 Points • 1-year relevant experience: 1 Point • No relevant experience: 0 <p>Policy and Legal drafting Specialist:</p> <ul style="list-style-type: none"> • 5 years' relevant experience (policy or legal drafting or combination of policy and legal drafting experience) : 5 Points • 4 years' relevant experience (policy or legal drafting or combination of policy and legal drafting experience) : 4 Points • 3 years' relevant experience (policy or legal drafting or combination of policy and legal drafting 	as per requirements	

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EVALUATION CRITERIA	GUIDELINES FOR CRITERIA APPLICATION	EVIDENCE	WEIGHT
	<p>experience): 3 Points</p> <ul style="list-style-type: none"> • 2 years' relevant experience (policy or legal drafting or combination of policy and legal drafting experience): 2 Points • 1 years' relevant experience (policy or legal drafting or combination of policy and legal drafting experience): 1 Point • No relevant: 0 		
TOTAL POINTS ON FUNCTIONALITY			100
MINIMUM FUNCTIONALITY			70

Stage 5: Price and Specific Goals

- Bids will be evaluated in accordance with the prescripts of the Preferential Procurement Policy Framework Act (PPPFA) and the associated Preferential Procurement Regulations of 2022, which stipulate a 80/20 point split for requirements with a Rand value equal to or below R 50 000 000, inclusive of all applicable taxes.
- The Bidder must provide an all-inclusive price including VAT and must complete the SBD 3.3 form. **Note: Disbursements will be capped at 10% of the contract amount.**
- A valid SANAS B-BBEE Status Level Verification certificate or a B-BBEE certificate issued by the Companies and Intellectual Property Commission, with the exception of EME's (Exempt Micro Enterprises) and QSE's (Qualifying Small Entity) who are required to submit sworn affidavit in terms of Code of Good Practice. The sworn affidavit must be signed by the EME representative and attested by a Commissioner of oath.
- As bids are only invited for requirements with a Rand value equal to or below R 50 000 000 inclusive of all applicable taxes, the 80/20 system shall be applicable and will be calculated as follows:

SN	COMPONENT	POINTS
1.	Price:	80
2.	Preferential points: Specific goals	20
	TOTAL:	100

Specific goals

Note to tenderers: The tenderer **must** indicate how they claim points for each preference point system.

Specific goals allocated points in terms of this tender	Allocated Preference points	Evidence
<p>The company owned / director/s / shareholders by people who are Women.</p> <ul style="list-style-type: none"> 100% company owned by people who are Women = 10 points ≥51% and <100% company owned by people who are Women = 7 points >0% and <51% company owned by people who are Women = 2 points 0% company owned by people who are Women = 0 points 	10	<p>Proof of claim as declared on SBD 6.1 in verifying the tenderer's status.</p> <p>The following must be submitted as proof of claim as declared on SBD 6.1 for the specific goals:</p> <ul style="list-style-type: none"> Company Registration Certification as issued by the Companies and Intellectual Property Commission (CIPC). Sworn Affidavit or valid B-BBEE Certificate or Consolidated B-BBEE certificate for Consortium, Joint Venture, or Trust.
<p>The company owned / director/s / shareholders by people who are Black.</p> <ul style="list-style-type: none"> 100% company owned by people who are Black = 7 points ≥51% and <100% company owned by people who are Black = 5 points >0% and <51% company owned by people who are Black = 2 points 0% company owned by people who are Black = 0 points 	7	<p>Proof of claim as declared on SBD 6.1 in verifying the tenderer's status.</p> <p>The following must be submitted as proof of claim as declared on SBD 6.1 for the specific goals:</p> <ul style="list-style-type: none"> Company Registration Certification as issued by the Companies and Intellectual Property Commission (CIPC). Sworn Affidavit or valid B-BBEE Certificate or Consolidated B-BBEE certificate for Consortium, Joint Venture, or Trust.
<p>The company owned / director/s / shareholders by people who are Disabled.</p> <ul style="list-style-type: none"> 100% company owned by people who are Disabled = 3 points ≥51% and <100% company owned by people who are Disabled = 2 points >0% and <51% company owned by people who are Disabled = 1 points 0% company owned by people who are Disabled = 0 points 	3	<p>Proof of claim as declared on SBD 6.1 in verifying the tenderer's status.</p> <p>The following must be submitted as proof of claim as declared on SBD 6.1 for the specific goals:</p> <ul style="list-style-type: none"> Company Registration Certification as issued by the Companies and Intellectual Property Commission (CIPC). Sworn Affidavit or valid B-BBEE Certificate or Consolidated B-BBEE certificate for Consortium, Joint Venture, or Trust.

***NB: Points will be allocated based on % ownership to the Company (main tendering entity). Please attach proof/ required documents.**

PRICING SCHEDULE
(Professional Services)

NAME OF BIDDER:	BID NO: <u>DHA14-2025</u>
CLOSING TIME <u>11:00</u>	CLOSING DATE: <u>21 AUGUST 2025</u>

OFFER TO BE VALID FOR 90 DAYS FROM THE CLOSING DATE OF BID.

ITEM NO	DESCRIPTION	BID PRICE IN RSA CURRENCY ** (ALL APPLICABLE TAXES INCLUDED)
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1. The accompanying information must be used for the formulation of proposals.

2. Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project. R.....

3. Period required for commencement with project after acceptance of bid

4. Estimated man-days for completion of project

5. Are the rates quoted firm for the full period of contract? **Only firm prices will be accepted.**

BIDDER'S DISCLOSURE**1. PURPOSE OF THE FORM**

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

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

2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise,

employed by the state?

YES/NO

2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of State institution

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

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

2.2.1 If so, furnish particulars:

.....
.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

2.3.1 If so, furnish particulars:

.....
.....

3 DECLARATION

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

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

3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;

3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.

3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.

3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89

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

of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....

Signature

.....

Date

.....

Position

.....

Name of bidder

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

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 To be completed by the organ of state

- a) The applicable preference point system for this tender is the 80/20 preference point system.
- b) The 80/20 preference point system will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- a) Price; and
- b) Specific Goals.

1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	100

- 1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.
- 1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

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

80/20

or

90/10

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

Where

- Ps = Points scored for price of tender under consideration
- Pt = Price of tender under consideration
- Pmin = Price of lowest acceptable tender

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

3.2.1. POINTS AWARDED FOR PRICE

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

80/20	or	90/10
$Ps = 80 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)$	or	$Ps = 90 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmax = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1 In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
- 4.2 In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
 - (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system, then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

Table 1: Specific goals for the tender and points claimed are indicated per the table below.

80/20 preference point system is applicable, corresponding points must also be indicated as such.

Note to tenderers: The tenderer must indicate how they claim points for each preference point system.

The specific goals allocated points in terms of this tender	Number of points Allocated (80/20 system) (To be completed by the organ of state)	Evidence	Number of points claimed (80/20 system) (To be completed by the tenderer)
<p>The company owned / director/s / shareholders by people who are Black.</p> <ul style="list-style-type: none"> 100% company owned by people who are Black = 7 points ≥51% and <100% company owned by people who are Black = 5 points >0% and <51% company owned by people who are Black = 2 points 0% company owned by people who are Black = 0 points 	7	<p>Proof of claim as declared on SBD 6.1 in verifying the tenderer's status</p> <p>The following must be submitted as proof of claim as declared on SBD 6.1 for the specific goals:</p> <ul style="list-style-type: none"> Company Registration Certification as issued by the Companies and Intellectual Property Commission (CIPC). Sworn Affidavit or valid B-BBEE Certificate or Consolidated B-BBEE certificate for Consortium, Joint Venture, or Trust. 	
<p>The company owned / director/s / shareholders by people who are Women.</p> <ul style="list-style-type: none"> 100% company owned by people who are Women = 10 points ≥51% and <100% company owned by people who are Women = 7 points >0% and <51% company owned by people who are Women = 2 points 0% company owned by people who are Women = 0 points 	10	<p>proof of claim as declared on SBD 6.1 in verifying the tenderer's status</p> <p>The following must be submitted as proof of claim as declared on SBD 6.1 for the specific goals:</p> <ul style="list-style-type: none"> Company Registration Certification as issued by the Companies and Intellectual Property Commission (CIPC). Sworn Affidavit or valid B-BBEE 	

The specific goals allocated points in terms of this tender	Number of points Allocated (80/20 system) (To be completed by the organ of state)	Evidence	Number of points claimed (80/20 system) (To be completed by the tenderer)
		Certificate or Consolidated B-BBEE certificate for Consortium, Joint Venture, or Trust.	
<p>The company owned / director/s / shareholders by people who are Disabled.</p> <ul style="list-style-type: none"> 100% company owned by people who are Disabled = 3 points ≥51% and <100% company owned by people who are Disabled = 2 points >0% and <51% company owned by people who are Disabled = 1 points 0% company owned by people who are Disabled = 0 points 	3	<p>proof of claim as declared on SBD 6.1 in verifying the tenderer's status</p> <p>The following must be submitted as proof of claim as declared on SBD 6.1 for the specific goals:</p> <ul style="list-style-type: none"> Company Registration Certification as issued by the Companies and Intellectual Property Commission (CIPC). Sworn Affidavit or valid B-BBEE Certificate or Consolidated B-BBEE certificate for Consortium, Joint Venture, or Trust. 	

DECLARATION WITH REGARD TO COMPANY/FIRM

4.3 Name of company/firm.....

4.4 Company registration number:

4.5 TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One-person business/sole propriety
- ☐ Close corporation
- ☐ Public Company
- ☐ Personal Liability Company
- ☐ (Pty) Limited
- ☐ Non-Profit Company

☐ State Owned Company

[TICK APPLICABLE BOX]

4.6 I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 - (a) disqualify the person from the tendering process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution, if deemed necessary.

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SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME:

DATE:

ADDRESS:

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