



**FINANCIAL REGULATIONS
SECTION 22
BID NO: 92/2013**

**SUPPLY CHAIN MANAGEMENT – PREFERENTIAL PROCUREMENT POLICY -
EVALUATION CRITERIA
(PPP – EVALUATION CRITERIA)**

ONLY FOR USE OF BIDS ABOVE R50 MILLION AND MORE

Casidra, as a Schedule 3D development and implementation agent for the Western Cape Provincial Government underwrites, and complies to, the Provincial and National developmental initiatives and administers funds on behalf of donors. Within this context, and because of the specific requirements of the donors for the application of the funds, the awarding of bids are dependent on the special evaluation criteria as set out in the policies of **Casidra**. The evaluation criteria of this Preferential Procurement Policy is based on the “**Preferential Procurement Policy Framework (Act 5 of 2000)**” and related Regulations.

Awarding of the bid is dependent on a **pre-qualifying criterion, functional score**, compulsory subcontracting as a condition of tender, preferential points system, and every presentation is measured against the specific evaluation criteria as shown. **The completion and signature of the document is thus a pre-requisite to qualify as a service provider.**

GENERAL DETAILS: (Please print clearly)	
Registered Company Name	
Trading Name / Individual Full Name	
Company Reg Number / ID Number	
VAT Number	
CSD Supplier Number *	
CSD Unique Registration Ref Number *	
Postal Address	
Postal Code	
For office use only	Version no: 11.1
To be initialled by bidder	<i>Initial here</i>
Date: 15 February 2021	

Physical Address			
Postal Code			
CONTACT DETAILS			
Representative Name			
Telephone Number			
Cell Phone Number			
Fax Number			
Email Address			
Website Address			
OTHER DETAILS			
Main Business Type (<i>Please tick</i>)		Consultants & Professionals	
Tools & Equipment (Hardware)		Clothing & Textiles	
Office Supplies & Furniture		Accommodation & Transport	
Training & Mentorship		Printing & Advertising	
Event Services (Catering, Venue Hire)		Irrigation & Water Services	
Earthmoving & Heavy Machinery		Other Production Inputs	
Seed, Fertilizer, Chemicals		Livestock & Animal Production	
Construction Services		Repairs & Maintenance	
Vehicles & Implements		Municipal & Bulk Services	
Other (Please Specify)			
* Note that you HAVE to register on the Central Supplier Database (CSD) (www.csd.gov.za) before we can use you as a service provider.			

Pre-qualifying criteria

- CIDB grading (for “construction” projects with a value of more than R200 000 only)**
“construction”: in terms of this requirement of the CIDB Act means; the provision of a combination of goods and services arranged for the development, extension, installation, repair, maintenance, renewal, removal, renovation, alteration, dismantling, or demolition of a fixed asset including building and engineering services.

Only those bidders who are registered with the CIDB, or are capable of being so prior to the evaluation of submissions, in a contractor grading designation equal to or higher than a contractor grading designation determined in accordance with Table 5 of the Construction Industry Development Regulations , for a class of construction work, are eligible to have their tenders evaluated. Within the framework of a targeted development programme and compulsory subcontracting objectives, **Casidra** may accept tender offers from a contractor who is registered as a potentially emerging enterprise that is one designation lower than the advertised class of construction work.

For office use only	Version no: 11.1	Date: 15 February 2021
To be initialised by bidder		<i>Initial here</i>

Joint ventures are eligible to submit tenders provided that:

1. Every member of the joint venture is registered with the CIDB;
2. The lead partner has a contractor grading designation in the (above indicated) class of construction work;
3. The combined contractor grading designation calculated in accordance with the Construction Industry Development Regulations is equal to or higher than a contractor grading designation determined in accordance with Table 9 of the Construction Industry Development Regulations.

Further Joint Venture criteria

- Tenders to note that if a joint venture is submitted, a JV cidb contract must accompany this bid.
- The joint Venture must clearly state the percentage split of responsibilities and also list all the responsibilities / duties of each member of the Joint Venture.
- The work and obligations making up the contract must be broken down into discrete elements, or sections, usually on the basis of locality, the nature of the work, or the capabilities and resources required.
- Each element is assigned to a specific member of the joint venture who assumes full responsibility for its execution, under the direction of the joint venture must be indicated

Failure to submit above information, if submitting a Joint Venture bid, will mean disqualification of the bid.

• **Section D – Designated Sectors – Local Content**

The following sectors in this bid are subject to a stipulated minimum threshold for local production and content:

Sector	Minimum Threshold (%)

If Section D is applicable, **Form SBD 6.2** must be completed and signed as well as **Annex C Local Content Declaration – Summary Schedule**, and must be handed in as part of the bid documentation.

- **Proof of competency of Construction Manager**
(Specify the level of competency needed with reference to specific person CV)
- **Special qualification or training or professional registration**
(Specify the qualification)
- Other ???

Sub-contracting

For office use only	Version no: 11.1	Date: 15 February 2021
To be initialled by bidder		<i>Initial here</i>

Full disclosure by the contractor must be made in the bid documents to **Casidra** with full details on the subcontractor as well as proof of the capacity and ability of the subcontractor to execute the work. Subcontracting a portion of the tender, without disclosure and approval by **Casidra**, the Contractor can be penalised up to 10% of the value of the contract.

Compulsory subcontracting: According to Casidra’s own empowerment impact assessment, it is a requirement that (at least 30% or ...%) of the contract value must be subcontracted to designated groups described as (Supply detail information and CV on the subcontractors similar to the requirements for the principle contractor)

The tenderer must select a supplier/s from the list of suppliers registered on the CSD for the required goods and services in respect of the designated groups as stated above. (see list of suppliers attached)

Will any portion of the contract be sub-contracted? YES / NO (delete which is not applicable)

If YES, indicate:

- (i) what percentage of the contract will be subcontracted?
- (ii) The name of the sub-contractor?
- (iii) The B-BBEE status level of the sub-contractor?
- (iv) Whether the sub-contractor is an EME? YES / NO (Attach B-BBEE certificate / an **original** sworn affidavit as proof)

Final points awarded to bid = (B) Price Max 90% + (C) B-BBEE Max 10%

Section A – Functional Requirements

Functional refers to: A service or product that is designed to be practical, useful, working or operating, taking into account factors like quality, reliability, viability, and durability and the technical capacity (time and resources) and ability (knowledge and skills) of the bidder to execute the works.

An offer that does not obtain the minimum score for each functionality criterion or the minimum weighted average for functionality as indicated, is not an acceptable tender. Is this bid subject to the evaluation of functional requirements? **YES / NO** (**Casidra** to indicate)

If “**YES**”, the following criteria will be used for evaluation:

No	Evaluation criteria	Weight (A)	Score (B) 1= poor 5=excellent	Minimum score required	Total (A x B)
1	Experience of similar work	40%	For office use	4	For office use
2	References of previous work	30%	For office use	4	For office use
3	Locally produced services, works or goods	10%	For office use	3	For office use
4	Special qualification or knowledge needed	20%	For office use	4	For office use
				% = Total / 5	For office use

For office use only	Version no: 11.1	Date: 15 February 2021
To be initialised by bidder		<i>Initial here</i>

TOTAL SCORE - A minimum score of <u> ?? </u> % is required for functional requirements for this bid to be considered for further evaluation		
--	--	--

Functional Item	1 Poor: Non compliant	2	3	4	5 Excellent: Fully compliant
References from clients on similar nature related previous work	No references or very poor rapport	Some minor problems experienced	Acceptable	Recommended	Highly recommended
Construction equipment available for contract	Has no plant resources at all	Has insufficient in-house plant available to execute works & has to hire most of the plant externally	Has basic in-house plant available to execute works but also has to hire externally	Has sufficient in-house plant available to execute works	Has more than sufficient in-house plant available to execute works
Experience of similar work – (refer to company CV)	No experience	Limited exposure to work at hand	Not similar, but related	Similar work	High level similar work
Additional to compulsory special qualification or knowledge needed for specific activity – (Specify)	No qualifications / Knowledge	Limited qualifications / Knowledge of specialist skills needed	Average qualifications / Knowledge of specialist skills needed	High qualifications / Knowledge of specialist skills needed	Excellent qualifications / Knowledge of specialist skills needed
Preference to local contractors	South Africa	Western Cape	Geographical region	District Municipality	Local Municipality or town

Section B – Formula for Awarding of Price Points (Only to be considered if Section A has met the minimum requirement)

For office use only	Version no: 11.1	Date: 15 February 2021
To be initialled by bidder		<i>Initial here</i>

Unconditional discounts offered will be taken into account for determining the following point:

$$\text{Point} = 90 \left[1 - \frac{\text{Price} - \text{P min}}{\text{P min}} \right] \quad \text{where P min is the lowest acceptable bid}$$

Section C – B-BBEE Contribution

An **EME** must submit a **valid, originally certified and signed sworn affidavit** confirming annual turnover and level of black ownership or an affidavit issued by Companies Intellectual Property Commission (accounting officer for a Closed Corporation). If a **startup EME**, a certificate issued by CIPC on the BEE status is accepted.

A **QSE that is less than 51% (50% or less) black owned** must be verified in terms of the QSE scorecard issued via Government Gazette and submit a **valid, original or a legible originally certified copy** of a B-BBEE Verification Certificate issued by SANAS.

A **QSE that is at least 51% black owned (51% or higher)** must submit a **valid, originally certified and signed sworn affidavit** confirming turnover and level of black ownership as well as declare its empowering status or an affidavit issued by Companies Intellectual Property Commission.

A **large enterprise** must submit a **valid, original or originally certified copy** of a B-BBEE Verification Certificate issued by a verification agency accredited by SANAS.

A **trust, consortium or joint venture**, will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their B-BBEE status level certificate.

A **trust, consortium or joint venture** (including unincorporated consortia and joint ventures) must submit a consolidated B-BBEE status level verification certificate for every separate tender.

Tertiary institutions and public entities will be required to submit their B-BBEE status level certificates in terms of the specialized scorecard contained in the B-BBEE Codes of Good Practice.

Bids of non-compliant contributors (no certificate) will be considered, but no points will be awarded for B-BBEE status.

B-BBEE Status level of contributor	Number of points	Points awarded	BEE recognition level
1	10	EME & QSE 100% Black owned For office use	135%
2	9	EME & QSE 51% + Black owned For office use	125%
3	6	For office use	110%
For office use only		Date: 15 February 2021	
To be initialled by bidder		<i>Initial here</i>	

4 and EME	5	EME 51% < Black owned For office use	100%
5	4	For office use	80%
6	3	For office use	60%
7	2	For office use	50%
8	1	For office use	10%
Non-compliant contributor	0	For office use	0%

Market related pricing

If the bidder, whose tender has been compliant, and that received the highest overall points, do not offer a market related price, the offer may be negotiated with that bidder to be market related.

Are you willing to negotiate your offer? YES / NO (delete which is not applicable)

If a market related price cannot be negotiated, the offer for negotiation will be extended to the second highest point scoring bidder, then the third highest scoring bidder, where after, failing to reach any agreement, the tender will be cancelled.

Declaration of interest and Bidders past supply chain management practices

In terms of **section 22 of the CBD 2.1** Conditions of Tender document:

Are any family member, trustee, director, shareholder or member of the bidder in any way connected to the State?

and/or

Do any potential conflict of interest exist, where the public duties (like being part of an approval or adjudication process) and private interests of the bidder, could improperly influence or lend inside trading information to the bidder?

and/or

Do the bidder have any relationship with a person that may be involved with the evaluation or adjudication of this bid? In view of possible allegations of favouritism, it is required that the bidder declare his/her position in relation to the Client.

If so, furnish particulars:

.....

The bid may be disregarded if that bidder or its directors have abused the Client’s supply chain management system, committed fraud or any other improper conduct in relation to such system.

- (i) Is the bidder or any of its directors;

For office use only	Version no: 11.1	Date: 15 February 2021
To be initialled by bidder		<i>Initial here</i>

- listed on the National Treasury’s Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector? (www.treasury.gov.za, follow the link at the bottom of the home page);
- Listed on the register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act;

(ii) Was the bidder or any of its directors;

- convicted by a court of law (including a court outside of the RSA) for fraud or corruption during the past five years?
- contract with any organ of state terminated during the past five years on account of failure to perform on or comply with the contract?

(iii) The contractor is not known to be insolvent, in receivership, bankrupt or being wound up, or has its affairs administered by a court or a judicial officer, has suspended its business activities, or is subject to legal procedures in respect of any of the foregoing.

If so, furnish particulars:

.....

IMPORTANT NOTES

Casidra reserves the right to:

- disregard any bids where the declaration (below) has not been signed;
- change the point system of the policy without prior notification;
- negotiate prices based on market related pricing before award of the bid;
- accept parts of the bid items or split bids based upon item prices
- disclose the results of the points awarded on request;
- evaluate and award points according to the documentation supplied and evaluate functionality at its own discretion;
- award the bid to the qualifying Contractor with the highest number of points scored, unless the prices are not market related or on the basis of objective criteria stated in the tender documents, like fairness, safety, public interest and international suppliers;
- to award the bid to a Contractor which does not necessarily have the lowest price.

Other Notes:

- Final points scored will be rounded off to the nearest 2 decimal places
- In the event of equal scores, the offer with the highest B-BBEE score will be successful. If scores are still equal, and where functionality is part of the bid, the offer with the highest functionality score will be successful. If the scores are still equal, the drawing of lots will determine the outcome.

The bid may be cancelled if:

- all the bid offers received are lower than R50 million;
- circumstances change and there is no longer a requirement for this service;
- funds are no longer available or if there are insufficient funds available in the budget for the work;

For office use only	Version no: 11.1	Date: 15 February 2021
To be initialled by bidder		<i>Initial here</i>

- no acceptable bids and/or market related prices are received;
- there is a material irregularity in the tender process;
- false information were supplied by the bidder.

Cancellation of bid will be placed in the same media as initially advertised.

Bids which are suspected to supplied false information will be subjected the *alteram partem* rule. If proven that false information was supplied, disqualify the tender or terminate the contract, without payment and/or claims for damages incurred by such cancellation.

The Contractor will be liable for the recovery of all costs and damages suffered as a result of the misconduct or cancellation of the bid or less favourable conditions affecting the award of the bid.

Exclusion of the Contractor and its directors, who acted fraudulently, from any business with an organ of state for a period not exceeding 10 years after has been applied.

Declaration by the company submitting the bid:

I, _____

as the authorised representative of the company / CC / business hereby declare that, to the best of my knowledge the abovementioned information is true and correct and that I am duly authorized as a signatory of this bid. On behalf of my business I accept the terms and conditions as set out in this document. I will supply documentary proof of any information supplied herein on request and to the satisfaction of **Casidra**.

In terms of the POPI Act I further give consent that my contact and company details as will be captured on the **Casidra** database may be shared with the role players/funders involved in the project and be used by **Casidra** for the purpose of further procurement.

Signature

Date

SUPPLY CHAIN PERFORMANCE MEASUREMENT

In order for **Casidra** to measure its supply chain efficiency and effectiveness, please assist us by answering the following questions:

- **What were the source that made you became aware of this bid being available.**

Mark with X

Personal Email invite to bid:	
Via a friend or business partner:	
National Government E-Tender website:	
Local Newspapers:	
Casidra own website:	
CIDB website	

Other: Specify.....

- **Was the time allowed to date of closure sufficient for you to compile an offer.**

For office use only	Version no: 11.1	Date: 15 February 2021
To be initialled by bidder		<i>Initial here</i>

No – too short	Yes - Sufficient	No - Too long
----------------	------------------	---------------

For office use only	Version no: 11.1	Date: 15 February 2021
To be initialled by bidder		<i>Initial here</i>