



**APPOINTMENT OF A SERVICE PROVIDER TO DEVELOP THE  
COMMUNITY ROAD SAFETY COUNCIL POLICY**

**RTMC BID 26/2015/16**



**Road Traffic**  
Management Corporation

# **SECTION: 1**

## **CONDITIONS AND UNDERTAKINGS BY BIDDER IN RESPECT OF THIS BID**

Road Traffic  
Management Corporation

## SECTION 01: CONDITIONS AND UNDERTAKINGS BY BIDDER IN RESPECT OF THIS BID

### 1. **Proprietary Information**

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Road Traffic Management Corporation (RTMC) considers this Tender and all related information, either written or verbal, which is provided to the respondent, to be proprietary to RTMC. It shall be kept confidential by the respondent and its officers, employees, agents and representatives. The respondent shall not disclose, publish, or advertise this specification or related information to any third party without the prior written consent of RTMC.

### 2. **Enquiries**

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2.1 All communication and attempts to solicit information of any kind relative to this bid should be channeled to the email below:

Name	<b>RTMC</b>
Email Address	<a href="mailto:CRSC@rtmc.co.za">CRSC@rtmc.co.za</a>

2.2 All the documentation submitted in response to this tender must be in English.

2.3 No enquiries will be entertained for this bid will be responded to post the compulsory briefing session. All enquiries will be consolidated and posted to the RTMC website under tenders next to the same bid.

2.4 The RTMC may respond to any enquiry in its sole discretion and the bidder acknowledges that it will have no claim against the RTMC on the basis that its bid was disadvantaged by lack of information, or inability to resolve ambiguities.

### 3. **Validity Period**

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

### 4. **Supplier Performance Management**

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

- 4.2 The successful bidder shall upon receipt of written notification of an award, be required to conclude a Service Level Agreement (SLA) with the RTMC, which will form an integral part of the supply agreement. The SLA will serve as a tool to measure, monitor and assess the supplier's performance level and ensure effective delivery of service, quality and value-add to RTMC business.
- 4.3 Successful bidder(s) are required to comply with the above condition, and also provide a scorecard on how their product / service offering is being measured to achieve the objectives of this condition.

## **5. Instructions on submission of Bids**

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- 5.1.1 Bidders should be submitted in **Five (5) copies** and one electronic copy (on CD in PDF format) all bound in a sealed envelope endorsed, **RTMC BID 26/2015/16: Appointment of a Service Provider to Develop the Community Road Safety Council Policy**
- 5.2 The sealed envelope must be placed in the bid box at the Main Reception area of the RTMC Building, Boardwalk Office Park, Boardwalk Boulevard, Phase 5, Faerie Glen, Pretoria East by no later than **11:00 AM on 18 January 2016**.
- 5.3 A valid tax clearance certificate must be included in the bid response, or proof of application endorsed by SARS in this regard.
- 5.4 The bidder's company name, closing date and the return address must also be endorsed on the envelope.
- 5.5 All bids submitted must be signed by a person or persons duly authorised thereto.
- 5.6 If a courier service company is being used for delivery of the bid document, the bid description must be endorsed on the delivery note/courier packaging to ensure that documents are delivered into the bid box. The RTMC will not be held responsible for any delays where documents are not placed in the bid box before closing time.
- 5.7 Bid received by telegram, telex, email, facsimile or similar medium will not be considered.

- 5.8 Where a bid document is not placed in the bid box at the time of the bid closing, such a bid document will be regarded as a late bid. Late bids will not be considered.
- 5.9 Amended bids may be sent in an envelope marked “**Amendment to Bid**” and should be placed in the bid box before the closing time.
- 5.10 Where a bid has a **compulsory briefing session** as a condition, bidders who do not attend or send a representative **will be automatically disqualified** and bid responses will not be accepted/evaluated.
- 5.11 Bidders should check the numbers of the pages to satisfy themselves that none are missing or duplicated. No liability will be accepted by RTMC in regard to anything arising from the fact that pages are missing or duplicated.

## **6. Undertakings by the Bidder**

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- 6.1 The bidder accepts that all costs incurred in preparation, presentation and any demonstration in relation to this bid shall be for the account of the bidder.
- 6.2 The bidder hereby offer to render all or any of the services described in the attached documents to the RTMC on the terms and conditions and in accordance with the specifications stipulated in this bid documents (and which shall be taken as part of, and incorporated into, this proposal at the prices inserted therein).
- 6.3 The bidder shall prepare for a possible presentation should RTMC require such and the bidder shall be notified thereof no later than 4 (four) days before the actual presentation date. Such presentation may include demonstration of products or services as called for by the RTMC in relation to this bid.
- 6.4 The successful bidder hereby accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on him/her under this agreement as the principal(s) liable for the due fulfilment of this contract.

- 6.5 The bidder furthermore confirm that he/she has satisfied himself/herself as to the correctness and validity of his/her bid response that the price(s) and rate(s) quoted cover all the work/item(s) specified in the bid response documents and that the price(s) and rate(s) cover all his/her obligations under a resulting contract and that he/she accept that any mistakes regarding price(s) and calculations will be at his/her risk

## **7. RTMC's Rights**

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- 7.1 The RTMC reserves the right not to accept the lowest bid or any bid in part or in whole. RTMC normally awards the contract to the bidder who proves to be fully capable of handling the contract and whose bid is technically acceptable and/or financially advantageous to the RTMC.
- 7.2 The RTMC also reserves the right to award this bid as a whole or in part without furnishing reasons.
- 7.3 The RTMC reserves the right to conduct a site visit at the premises of the offices or at any client sites if so required.
- 7.4 The RTMC reserves a right to amend any bid conditions, validity period, specifications, or extend the closing date of bid prior to the initially stated closing date. Bidders will be advised in writing of such amendments in good time.
- 7.5 The RTMC reserves the right to request all relevant information, agreements and other documents to verify information supplied in the bid response. The bidder hereby gives consent to the RTMC to conduct background checks on the bidding entity and any of its directors/trustees/shareholders/members.

## **8. Supplier Development and Promotion of Emerging Black Owned Service Provider**

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- 8.1 The RTMC promotes enterprise development In this regard, successful bidders are encouraged to mentor SMME's and/or Youth owned businesses. The implications of such arrangement will be subject to negotiations between the RTMC and the successful bidder.
- 8.2 It is also the objective of the RTMC to promote transformation of the South African economy and as such, bidders are encouraged to partner with a black owned entity (being 50%+1 black owned and controlled). Such partnership may include the formation of a Joint Venture and/ or subcontracting agreement etc.,

where a portion of the work under this bid would be undertaken by black owned entities.

- 8.3** To give effect to this requirement, bidders are required to submit a partnership/ subcontracting proposal detailing the portion of work to be outsourced, level of involvement of the black owned partner and where relevant, submit a consolidated B-BBEE scorecard in-line with the provisions of the PPPFA Regulations which will be considered as part of the B-BBEE scoring.

**9. Bidders Details and Contact Person**

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<b>DETAILS OF BIDDERS</b>			
<b>Name of your Company (in block letters)</b>			
<b>Signature(s) of the Bidder or assignee(s)</b>		<b>Date</b>	
<b>Name of person signing (in block letters)</b>			
<b>Capacity</b>			
<b>Are you duly authorized to sign this Bid?</b>			
<b>Company Registration Number</b>			
<b>VAT Registration Number</b>			
<b>Postal address (in block letters)</b>			
<b>Physical address (in block letters)</b>			
<b>Domicilium citandi et executandi in the RSA (full street address) (in block letters)</b>			



DETAILS OF THE CONTACT PERSON	
Name of Contact Person	
Telephone Number	
Fax Number	
Cellphone Number	
E-Mail Address	

## 10. RESPONSE FORMAT

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

### 10.1 Cover Page:

**10.1.1** The cover page must clearly indicate the bid reference number, bid description and the bidder's name

**10.1.2 Annexure 1** Invitation to Bid (SBD 1 - duly completed and signed)

### 10.2 Schedule 1:

**10.2.1** Executive summary of the bidder's Company/Joint Venture/Partnership/Close Corporation.

**10.2.2 Annexure 2** of this RFP document (Duly completed and Signed)

### 10.3 Schedule 2:

**10.3.1** Original and Valid Tax clearance certificate(s); please refer to annexure below:

**Annexure 3** Tax Clearance Certificate Requirements

**10.3.2** Certified copies of your CIPRO company registration documents listing all members with percentages, in case of a CC. Or latest certified copies of all share certificates in case of a company;

**10.3.3** BEE Certificate verified by a SANAS accredited verification agency or a letter from the supplier's auditor (option only for Exempted Micro Enterprises with annual turnover less than R5 million)

**10.3.4 Annexure 4** Declaration of Interest (SDB 4)

**10.3.5 Annexure 5** Declaration of Bidders Past SCM Practices (SBD 8)

**10.3.6 Annexure 6** Certificate of Independent Bid Determination (SBD 9)

**Note: If a Consortium, Joint Venture or Subcontractor, the documents listed above (8.3.2) must be submitted for each Consortium/ JV member or subcontractor.**

**10.4 Schedule 3:**

**10.4.1** Responses to Section two of this document, in line with the format indicated in this bid document.

**10.5 Schedule 4:**

**10.5.1** A detailed pricing schedule breakdown for the e bid including any supporting schedules on price determination. The price schedule must be submitted on a separate sealed envelope.

**10.5.2 Annexure 7** Price Schedule Summary (SBD 3.3)

**10.5.3 Annexure 7** Preferential Point Claim (SBD 6.1)

**11. SPECIAL INSTRUCTIONS TO BIDDERS**

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**11.1** Bidders shall provide full and accurate answers to the questions posed in this document. Bidders **must** substantiate their response to all questions, including full details on how their proposal/solution will address specific functional/technical requirements. All documents as indicated must be supplied as part of the bid response

**12. EVALUATION CRITERIA**

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The bid will be evaluated on a two stage process. Stage 1 will be on Functionality and Stage 2 will be on 90/10 Preference Point System (i.e. Price and B-BBEE).

**12.1 STAGE 1 – FUNCTIONALITY CRITERIA**

Stage 1 will be conducted in **two steps** with each step having its own functional evaluation criteria.

**12.1.1 STEP 1**

The first step will be based on written proposals and shall be evaluated based on the following parameters for functionality:

<b>Requirements</b>	<b>Score</b>
<b>A. Compliance to outlined response format and quality of the proposal</b>	<b>5</b>
A1 The section relates to responses received according to the specified format in paragraph 8 above and the quality of the bid proposal content.	5
<b>B. Overall Work Plan</b>	<b>40</b>
<b>Methodology</b>	
B2 The bidder must provide a clear, detailed and defined methodology how to develop the strategy and motivate the choice of employing the said approach.	10
B3 A plan of how the service provider will manage stakeholders throughout the development of the strategy with all stakeholders in the industry to solicit inputs and buy in.	10
B4 The service provider must demonstrate how the Community Road Safety Council Policy will be aligned to local, regional and international best practice and consistent with the provisions of other relevant legislations.	10
<b>Project Development Plan</b>	
B5 Provide approach and project management plan from the start to the finalisation project stage (project plan outlining activities, milestones and timelines).	10
<b>C. References of Similar Work Done (Policy Development in the Public Sector)</b>	<b>15</b>
C1 The bidder must provide details of similar work completed in line with the below: Name and short description of project previously completed/involved at, Role, Responsibilities, Duration of involvement (in months), Value of the contract, Contactable References, Relevance of project and Key Lessons	15
<b>D. Qualifications , Skills &amp; Experience of the Project Team</b>	<b>15</b>
D1 The bidder must provide CVs of each anchor Project Lead and provide details of the qualification, skills and experience. The following Anchor Project lead roles must be included in the CV's provided: (1) Project Lead (SME in Strategy Development) (2) Technical SME (e.g. Acts, Legislations, Safety etc) (3) Research Analyst (4) Communication / Facilitation expert (5) Other key skill	3 3 3 3 3
Bidder's will be evaluated from a minimum of 2 years to 10+ years	
<b>Total</b>	<b>75</b>

**NOTE: ONLY BIDDER'S THAT SCORE A MINIMUM OF 60 ON THE ABOVE EVALUATION CRITERIA WILL BE CONSIDERED FOR THIS SECOND PART OF THE FUNCTIONAL EVALUATION STAGE (PRESENTATION)**

### 12.1.2 STEP 2

The second part will be based on presentations being made to the RTMC and will be evaluated based on the following parameters for functionality.

#### PRESENTATION EVALUATION

<b>E. Knowledge Of The Subject Matter</b>	<b>25</b>
1. Outline summary of the Community Road Safety Council Policy approaches, tools, relevant policies and systems.	10
2. Innovative and realistic proposals on strategies to be considered for inclusion in the strategy	7.5
3. Presentation quality and practical facilitation capabilities / techniques	7.5

The total functional evaluation score is 100

**NOTE: PLEASE SEE SECTION TWO OF THIS BID DOCUMENT FOR A DETAILED DESCRIPTION ON FUNCTIONALITY ASSESSMENT CRITERIA REQUIREMENTS**

#### 12.2 EVALUATION SCORING

Each panel member will rate each individual criterion on the score sheet using the following scale:

<b>Value</b>	<b>Description</b>
5- Excellent	Meets and exceeds the functionality requirements
4- Very Good	Above average compliance to the requirements
3- Good	Satisfactory and should be adequate for stated element
2- Average	Compliance to the requirements
0- Non Compliant	Does not comply to the requirements

**NOTE: THE MINIMUM QUALIFYING SCORE FOR OVERALL FUNCTIONAL EVALUATION IS 70%. ALL BIDDERS THAT FAIL TO ACHIEVE THE MINIMUM QUALIFYING SCORE ON FUNCTIONALITY WILL NOT BE CONSIDERED FOR FURTHER EVALUATION ON PRICE AND B-BEE.**

#### 12.3 STAGE 2 – PRICE AND PREFERENCE POINT SYSTEM

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

**NOTE: ALL PRICE PROPOSALS MUST BE SUBMITTED IN A SEPARATE SEALED ENVELOPE.**

<b>CRITERIA</b>	<b>POINTS</b>
Price	90
BEE	10
<b>TOTAL</b>	<b>100 points</b>

## **SECTION: 2**

# **SPECIFICATION DETAILS AND FUNCTIONALITY REQUIREMENTS**

**Road Traffic**  
Management Corporation

## **SECTION 2: TECHNICAL REQUIREMENTS SPECIFICATION**

### **1. PURPOSE OF THE PROJECT**

To invite proposals from service providers to develop the national community road safety council policy and to undertake deliverables related to the policy.

### **2. OVERVIEW**

The RTMC, a Public Entity, was established in terms of Section 3, of the Road Traffic Management Corporation Act, No. 20 of 1999 to be the lead agency of road safety in all three spheres of Government within South Africa and reports to the Minister of Transport through the Shareholders' Committee.

The Corporation has the mandate to establish and run an effective road traffic management system to ensure the safety and quality of the life of citizens. To do this, the RTMC requires support of stakeholders to be successful in improving road safety.

Globally, road safety is not only a transport problem, but also a serious public health, social development, economic and social equity issue. South Africa is no different to other countries, as the costs related to road traffic deaths/injuries amount to R306 billion per annum.

Road crashes are amongst the major causes of fatalities worldwide resulting in serious social and economic costs, costing countries 1-3% of their gross national product. In 2004 road crashes was ninth in the leading cause of death barometer and it is anticipated that if nothing drastic is done about it, by 2030 it will be the fifth leading contributor to the mortality rate.

Furthermore 90% of road traffic deaths and injuries occur in low-income and middle-income countries, which have only 48% of the world's registered vehicles. Nearly half (46%) of those dying on the world's roads are "vulnerable road users": pedestrians, cyclists and passengers.

### **Snapshot of South African Road Safety Challenges:**

- ▶ 80% of the fatalities are adult and male in the **age category 19 -34**.
- ▶ **Pedestrians** – just fewer than 40% of fatalities comprise of pedestrian in both, urban and rural areas.
- ▶ **Drivers, with those aged 25 – 34** (new and inexperienced) most susceptible.
- ▶ **Passengers:** the majority of fatalities being female who rely on public transport vehicles.
- ▶ **Children** are vulnerable as both pedestrians and passengers.

### **Top Six (Major) Contributory Factors of road crashes are:**

- ▶ **Speeds** too high for circumstances: loss of control and/or inability to avoid hazards.
- ▶ **Dangerous overtaking** - barrier line infringements and/or overtaking in the face of on-coming vehicles.
- ▶ **Vehicle fitness:** defective tyres, steering and brakes especially on public passenger and freight transport vehicles.
- ▶ **Pedestrian negligence:** drink and walk, visibility, jay walking, walking on freeways.
- ▶ **Impaired Driving:** driving under the influence, fatigue and distracted driving
- ▶ **Occupant Safety:** seatbelts and child restraint systems

## **3. PROBLEM STATEMENT**

**3.1** The RTMC intends appointing a service provider with relevant background, knowledge and a proven track record in developing policies especially related to community outreach and development to work with a core team within the Corporation, relevant government organisations and other identified subject matter experts to assist the RTMC in developing the CRSC policy.

The policy seeks to embrace the community focused methodology of empowerment of people by enhancing their personal capacity and self-worth so that they can become aware of their potential to meet their road safety needs through participation

and ownership of the process of development. Thus the focus is on facilitating communities to take ownership of road safety issues within their communities.

The objective of the exercise is to develop a policy for the establishment of Community Road Safety Councils which are to be part of social reconstruction programme and will primarily be established to play an advocacy and public awareness role in strengthening road safety awareness and education within communities supported by relevant provincial authorities

The policy is to develop a replicable model to mobilise community participation together with public and private resources within a partnership approach to reduce road crashes and their high social and economic costs. Communities are in the best position to affect improvement in safety related problems and it is known fact that when a community takes ownership of an issue, change happens.

Develop community road safety projects in line with the strategic deliverables.

The need for this service has become apparent due to the high number of road deaths and fatalities that occur on a daily basis. The key challenges on road safety for South Africa are due to the following issues:

- There is a lack support by communities in the embracement of road safety
- Lack of standard operating guidelines in operating community structures to promote road safety.
- Lack of investment in community structures to promote road safety;
- Fragmentation of effort in addressing road safety challenges within the three spheres of Government, NGO's and the private sector;
- South African road user behaviour does not comply with road rules;
- Enforcement strategies need to be improved to engage communities in ensuring compliance with road safety rules
- The road infrastructure does not cater for communities and the current socio-economic situation that the country finds itself in-the roads are becoming broader while the walk ways are becoming smaller, yet the majority of the population are pedestrians.
- The continued perpetuation of apartheid spatial planning and development affecting public transport patterns, sustainability and safety.



#### 4. ROLES AND RESPONSIBILITIES OF CRSCs

The roles and responsibilities of CRSC should include, but not limited to the following:

##### **Education and Awareness:**

- Identification of road safety needs of vulnerable road users unique to your community
- Encourage cultural change that supports safe road user behaviour in the community;
- Undertake and assist with the dissemination of road safety information for the benefit of the community
- Assist with the implementation of behavioural change programmes that aims to reduce the incidence and severity of road crashes and injuries
- Provide education and awareness programmes to identified stakeholders
- Participate in road safety programmes as identified
- Monitor and report on the impact of road safety awareness and education programmes
- Attend periodic training and round table discussions on pertinent road safety issues

##### **Infrastructure:**

- Identify areas with high incidents of road injuries and fatalities;
- Identify places that require infrastructure enhancement to enable safe travel by road users
- Maintenance and upkeep of infrastructure

##### **Advocacy:**

- Enhance the effectiveness of road safety programmes through community mobilization;
- Encourage appropriate road behaviour through social media and appropriate events
- Identify and collaborate with appropriate stakeholders that can influence positive road behaviour
- Encourage the activities of local groups and organisations in road safety matters aligned to the approved road safety programmes and seek the involvement of the local community in support of the road safety programmes.
- Improve communication between relevant Provincial road safety entities and the community at large in order to improve the

effectiveness of road safety education and awareness programmes

## STRUCTURE OF COMMUNITY COUNCIL

The Community Road Safety Councils should comprise representatives of government stakeholders, and a range of organizations and individuals. Their aims are to develop and implement community programmes consistent with the road safety strategy of the region, and to develop support and close liaison between the groups involved.

### 5. PROJECT BRIEF AND DELIVERABLES

5.1 The services to the RTMC will cover the following areas:

Action	Activity
Scanning of national environment	<p>Since the announcement of the establishment of the CRSCs there has been no uniformity regarding its operations if at all they are operational in Provinces so an audit has to be undertaken to establish the status quo of the initiative.</p> <p>Meetings and stakeholder engagement sessions are to be held with all Provinces and other related stakeholders. The session will include 3 data collection sessions per Province.</p>
Appraisal of audit and determine recommendations	<p>Identify good practice models from evidence gathered.</p> <p>Gather inputs from related stakeholders</p>
Develop a national policy on CRSC	A guiding document is to be drafted for the operations of CRSCs nationally which will highlight the recruitment criteria roles and responsibilities of CRSCs, funding model, training needs, reporting structures, remuneration of CRSC, Standard operating procedures(SOP).
Ratification of policy by stakeholders.	<p>Develop a national steering committee</p> <p>Stakeholder engagements to get approval on policy x 3 meetings</p>
Identification of provinces to implement project and roll out of	Steering committee to develop project plan and roll out strategy of project. Identify Provinces where project are to

CRSC concept	rolled out and facilitate the implementation plan.
Developing of 2 community projects	2 x Visits where outreach projects are being implemented successfully. Outreach projects are to be developed for implementation in communities.
Monitoring of policy deliverables.	Deliverables of the policy are to be monitored by the project unit. A full report is to be provided at the end of the process.  Transfer skills.

## 5.2 Phase 1: Diagnostic Report

- Comprehensive review of current Community Road Safety Councils including detailed observation(s) and recommendation(s)
- Conduct an environmental scan on the state of road safety in South Africa. The research must have a defined methodology to assess the state of Road Safety in the country

## 5.3 Phase 2: 1st Draft Community Road Safety Council Policy

- Facilitate strategy development consultation processes with various stakeholders (RTMC will provide a list of all stakeholders who need to participate in the development of the strategy);
- Engage interested groups in the development, planning and outcomes process;
- Ensure compliance of the strategy to the applicable legislative frameworks;
- Alignment to the National, Regional and Global policies
- Evaluate and analyse alignment of the current National, Provincial and Local Department strategies in relation to the newly drafted Community Road Safety Council Policy.

## 5.4 Phase 3: 2nd Draft Community Road Safety Council Policy

- Include all inputs gathered through the consultation process
- Conduct International benchmarking of similar plan in not less than four countries for similar strategies and provide comparative analysis thereof;
- Develop an implementation plan, including a detailed resource requirements and estimated budget;
- Develop a roll-out plan for the Community Road Safety Council Policy;

- The strategy document must incorporate built in evaluation and impact assessment instrument(s) to measure successes and challenges in achieving its pronounced goals

#### **5.5 Final Community Road Safety Council Policy**

- Facilitate the approval of the Community Road Safety Council Policy by the relevant stakeholders (RTMC will identify all the relevant stakeholders that need to be engaged to get approval of the Community Road Safety Council Policy)
- Roll-out of the approved Community Road Safety Council Policy - Presentation to several stakeholders identified by the RTMC to communicate the approved strategy

### **6. STAKEHOLDER MANAGEMENT**

- 6.1 Several workshops will be held throughout the contract period, wherein all the elements of the work will be discussed.
- 6.2 The successful bidder is required to coordinate closely with the identified working groups by the RTMC, throughout the duration of the contract.
- 6.3 In particular, the overall project manager will inform and consult the working group on all major decisions regarding the development of the Community Road Safety Council Policy.
- 6.4 The Community Road Safety Council Policy draft documents shall be work shopped with the identified relevant stakeholders by the RTMC, and their input shall be integrated in the final policy document

### **7. DETAILED FUNCTIONALITY ASSESSMENT CRITERIA**

#### **7.1 COMPLIANCE TO OUTLINED RESPONSE FORMAT AND QUALITY OF THE PROPOSAL**

The section relates to responses received in accordance to the specified response format as outlined in paragraph 8 of section one above and the quality of the bid proposal content. The bidders response must demonstrate an understanding of the scope of work and requirements.

#### **7.2 OVERALL WORK PLAN**

##### **7.2.1 BIDDER'S PROPOSED METHODOLOGY**

- a) The bidder must provide a detailed methodology on how to conduct the project, furthermore to collate and analyse all the information on the development of the Community Road Safety Council Policy.

The following examples (**BUT NOT LIMITED TO**) could be considered:

- Data Collection Methods and Sources/Tools to be utilised in relation to the development of the Community Road Safety Council Policy
  - A process to ensure all alignment, integration, synergy to RTMC Act, and other legislation, frameworks and policies.
  - Provide consolidated report on findings during data analysis
- b) A plan of how the service provider will consult and collaborate with other stakeholders in the industry for their inputs and comment. Describe a method(s) of gathering inputs and obtaining buy-in from various stakeholders
- c) The bidder must demonstrate that the Community Road Safety Council Policy will be in line with international best practice and consistent with the provisions of other relevant legislations. Bidders are required to:
- Describe the method(s) to be utilised to ensure that the proposed Community Road Safety Council policy is drafted in line with all requirements of the legislation and to ensure that it complies with all approval processes.

### 7.2.2 BIDDER'S PROPOSED PROJECT PLAN

The project plan must amongst others include the following:

- a) Approach and project management plan from start to final stage (project plan outlining activities, milestones and timelines)
- b) Proposed Work Breakdown Schedule & Resource Allocation
- c) Realistic timelines that would be considered for the implementation of this project

### 7.3 REFERENCES OF SIMILAR WORK DONE

PREVIOUS RELEVANT COMPANY EXPERIENCE		
Project	a. Name and short description of project previously completed/involved at  b. Role <ul style="list-style-type: none"> <li>• Responsibilities</li> <li>• Skills &amp; expertise provided during that project</li> <li>• Duration of involvement (in months)</li> </ul> c. Please note: only projects of similar scope and outcomes or of particular relevance to the Evaluation will be evaluated and should therefore be included.	
	References: Please provide details of contactable	

PREVIOUS RELEVANT COMPANY EXPERIENCE		
	References	
	Relevance of project: <ul style="list-style-type: none"> <li>Highlight relevance of experience (similarities of projects and/or areas of relevance to this project)</li> </ul>	
	Key lessons: Identify key lessons learnt during this project and highlight applicability to this bid	

**Bidders to provide contactable references in the format below:**

Name of client:	Address:	Contact details:	Value of the contract:	Duration of the project:



## 7.4 KEY PERSONNEL

A team with highly qualified individuals that are respected as subject matter experts in their disciplines is required by RTMC. The following additional skills are considered necessary:

- Project management, communication and facilitation skills
  - Research and document writing capabilities
  - Experience in government based policy and strategies development
- a) The evaluation for functionality will be based on nominated and listed key personnel (including Anchor Key Member) with detailed CV's outlining qualification, competency, experience, and expertise
  - b) Experience related to similar evaluation and/or communications or educational projects (in months) with references which may be contacted for verification
  - c) A letter of confirmation regarding the availability of the Anchor Key Member for the duration of this project must be submitted with this bid. The letter should be co-signed by the bidding entity's CEO or similar & the Anchor Key Member
  - d) In addition to the CV's, a summarised list on key personnel qualification and skills should be provided as per the below format:

LIST RELEVANT PAST EXPERIENCE OF TEAM MEMBERS				
Name	Qualification	Institution	Membership of professional body	Key skills and expertise relevant to this project

## 7.5 PRESENTATION REQUIREMENTS - KNOWLEDGE OF THE SUBJECT MATTER

- a) The bidder must demonstrate an understanding of the state of road safety in the country with a broader understanding of pertinent issues that relate to the matter's such as global policy framework.
- b) Bidder's must also:
  - Demonstrate knowledge of the systems and tools for the management of road safety
  - Demonstrate an understanding of the transport sector, policies and legislation that govern the management, execution and implementation of road safety strategies
  - Demonstrate an ability to facilitate and engage professionally with the panel displaying presentation skills as well as an ability to manage multi levels of varying audiences
  - Demonstrate proven capacity to develop policy and conduct policy analysis.
- c) Innovation (additional information to the national framework provided in relation to road safety). Over and above the provisions of the Community Road Safety Council Policy framework, bidders are encouraged to provide any other relevant information which can enhance the development of the national road safety strategy and display their ability to innovate and provide meaningful solutions and proposals that RTMC could implement.

## 8. PRICE EVALUATION

- a) In order for the bid to be evaluated in terms of functionality, the Bidder must submit an Evaluation Work Breakdown Schedule of deliverables in Section 3.2 with Resource Allocation. Pricing Proposal:

CATEGORY	ACTIVITY	MILESTONE	PRICE
Project Initiation	Project Mobilisation	Project establishment	
Phase 1	Review and conduct environmental scan	Diagnostic Report	
Phase 2	Engagement, analysis and alignment including bench marking	1 <sup>st</sup> Draft Community Road Safety Council Policy Document	
Phase 3	Implementation and roll out plan inclusive of commentary and inputs	2 <sup>nd</sup> Draft Community Road Safety Council Policy Document	
Phase 4	Consolidation, approval and finalization of strategy including presentation	Final Community Road Safety Council Policy Document	
		<b>TOTAL</b>	

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**SECTION: 3**  
**PRICE PROPOSAL**



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## PRICE EVALUATION

In order for the bid to be evaluated in terms of functionality, the Bidder must submit an Evaluation Work Breakdown Schedule of deliverables in Section 3.2 with Resource Allocation. Pricing Proposal:

CATEGORY	ACTIVITY	MILESTONE	PRICE
Project Initiation	Project Mobilisation	Project establishment	
Phase 1	Review and conduct environmental scan	Diagnostic Report	
Phase 2	Engagement, analysis and alignment including bench marking	1 <sup>st</sup> Draft National Road Safety Strategy	
Phase 3	Implementation and roll out plan inclusive of commentary and inputs	2 <sup>nd</sup> Draft National Road Safety Strategy	
Phase 4	Consolidation, approval and finalization of strategy including presentation	Final Road Safety Strategy	
		<b>TOTAL</b>	

Further to the above, bidders must complete SBD 3.3 taking into account the above detail breakdown. Bidders are also encouraged to provide detail supporting calculations of the prices where possible

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**SECTION: 4**

**ANNEXURES AND STANDARD  
BIDDING DOCUMENTS**

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## ANNEXURE AND STANDARD BIDDING DOCUMENTS

DOCUMENT	DESCRIPTION
BDGI	Bid Documents General Information
Annexure 1	Invitation to Bid (SBD 1)
Annexure 2	Acceptance of Bid Conditions and Bidder's Structure
Annexure 3	Tax Clearance Requirements (SBD 2)
Annexure 4	Declaration of Interest (SBD 4)
Annexure 5	Declaration of Bidder's Past Supply Chain Management Practices (SBD 8)
Annexure 6	Certificate of Independent Bid Determination (SBD 9)
Annexure 7	Pricing Schedule (SBD 3.3)
Annexure 8	Preference Points Claim Forms (SBD 6)

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## BIDDING DOCUMENTS : GENERAL INFORMATION

1. The bidding forms are drawn up so that certain essential information is to be furnished in a specific manner. Any additional particulars shall be furnished in the enclosed questionnaire(s) or in a separate annexure.
2. The bidding forms should not be retyped or redrafted but photocopies may be prepared and used. Additional offers may be made for any item, but only on a photocopy of the page in question. Additional offers made in any other manner may be disregarded.
3. Bidding forms not filled in using a computer and printer shall be completed in black ink.
4. Bidders shall check the numbers of the pages and satisfy themselves that none are missing or duplicated. No liability shall be accepted in regard to claims arising from the fact that pages are missing or duplicated.
5. The forms in respect of Preference Points Claim, if attached, shall be completed and submitted with the completed Bid.
6. Firm bid prices and delivery periods are preferred. Consequently bidders shall clearly state whether prices and delivery periods will remain firm for the duration of the contract or not.
7. If non-firm prices are submitted, this fact should be clearly stated in the bidding documents.
8. Where items are specified in detail, the specifications from an integral part of the bidding document and bidders shall indicate in the space provided whether the items offered are to specification or not.
9. In respect of the paragraphs where the items offered are strictly to specification, bidders shall insert the words "as specified".
10. In cases where the items are not to specification, the deviations from the specifications shall be indicated.
11. The bid prices shall be given in the units shown.
12. All prices shall be quoted in South African currency.

13. All delivery costs must be included in the submitted bid prices.
14. Unless specifically provided for in the bidding document, no bids transmitted by telegram, telex, facsimile, e-mail or similar apparatus shall be considered.
15. All forms and tables must be completed as required. Non-submission of some required information will result in the bid declared invalid. In addition to the required information, brief additional information may be appended.
16. Bidders must ensure themselves that all the required forms, certificates and required documents are completed, signed and attached.
17. All bids are subjected to : the Project Specification, Special Provisions, Special Conditions and General Conditions of Contract.
18. Only the successful Bidder will be required to complete and sign a written Contract – Form SBD 7.
19. These conditions and information from part of the bid and failure to comply therewith may invalidate a bid.
20. For completion of SBD 6 Forms see relevant sections in Special Conditions of Contract.

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21. Have the company or any of its Directors, Shareholders or Joint Venture Partners in their present or previous capacity ever been restricted from bidding by any organ of the State? **\*Yes / No**

If in the affirmative, please provide full details of restriction:

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

( \*Please circle the applicable Yes or No response above clearly )

..... <b>Signature of Declarant</b>	..... <b>Bid Number</b>	..... <b>Date</b>
..... 1.1.1.1.1 Position of Declarant	..... 1.1.1.1.2 Name of Company / Organisation / Enterprise / Bidder	
<b>Witness 1 :</b> .....		<b>Witness 2 :</b> .....

**IMPORTANT BIDDING CONDITIONS**

1. Failure on the part of the bidder to sign this bid form and thus to acknowledge and accept the conditions in writing, or to complete the attached forms, questionnaires and specification in all respects, may invalidate the bid.
2. Bids should be submitted on the official forms and should not be qualified by the bidder's own conditions of bidding. Failure to comply with these requirements or to renounce specifically the bidder's own conditions of bid, when called upon to do so, may invalidate the bid.
3. If any of the conditions on these bid forms are in conflict with any special conditions, stipulations or provisions incorporated in the bidding documents, such special conditions, stipulations or provisions shall apply.
4. Each bid must be submitted in a separate, sealed envelope on which the **bid number, bid description, name and address of the bidder, and the closing date and time** must be clearly endorsed.



**YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE ROAD TRAFFIC MANAGEMENT CORPORATION**

**BID NUMBER:** ..... **CLOSING DATE:** ..... **CLOSING TIME:** 11:00  
**DESCRIPTION:**.....  
 .....

**The successful bidder will be required to fill in and sign a written Contract Form (SBD 7).**

BID DOCUMENTS MAY BE POSTED  
 TO:.....  
 .....

**OR**  
 DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)  
 .....  
 .....

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

The bid box is generally open 24 hours a day, 7 days a week.

**ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS – (NOT TO BE RE-TYPED)**

THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2011, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.

*THE FOLLOWING PARTICULARS MUST BE FURNISHED (FAILURE TO DO SO MAY RESULT IN YOUR BID BEING DISQUALIFIED)*

NAME OF BIDDER .....

POSTAL ADDRESS .....

STREET ADDRESS .....

TELEPHONE NUMBER CODE..... NUMBER.....

FASCIMILE NUMBER CODE..... NUMBER.....

EMAIL ADDRESS .....

VAT REGISTRATION NUMBER .....

HAS AN ORIGINAL AND VALID TAX CLEARANCE CERTIFICATE BEEN SUBMITTED? (SBD 2)

**YES or NO**

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

**YES or NO**

IF YES, WHO WAS THE CERTIFICATE ISSUED BY?

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

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

OR

A REGISTERED AUDITOR

**[TICK APPLICABLE BOX]**

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

**ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS / SERVICES / WORKS OFFERED?**

**YES or NO**

[IF YES ENCLOSE PROOF]

SIGNATURE OF BIDDER.....

DATE.....

CAPACITY UNDER WHICH THIS BID IS

SIGNED.....

TOTAL BID PRICE.....

TOTAL NUMBER OF ITEMS OFFERED.....



**ANY ENQUIRIES REGARDING THE BIDDING PROCEDURE MAY BE DIRECTED TO:**

Department: .....

Contact Person: .....

Tel: .....

Fax: .....

E-mail address:.....

**ANY ENQUIRIES REGARDING TECHNICAL INFORMATION MAY BE DIRECTED TO:**

Contact Person: .....

Tel: .....

Fax: .....

E-mail address:.....



**ANNEXURE 2 ACCEPTANCE OF BID CONDITIONS AND BIDDERS STRUCTURE**

**ACCEPTANCE OF BID CONDITIONS**

<b>BID REFERENCE NO.</b>	
<b>NAME OF BIDDER:</b>	
<b>AUTHORISED SIGNATORY:</b>	
<b>NAME OF AUTHORISED SIGNATORY:</b>	
<b>POSITION OF AUTHORISED SIGNATORY:</b>	
<b>BY SIGNING ABOVE, THE BIDDER HEREBY ACCEPT FULL RESPONSIBILITY FOR THE PROPER EXECUTION AND FULLFILMENT OF ALL OBLIGATIONS AND CONDITIONS DEVOLVING ON HIM/HER UNDER THIS BID.</b>	



**BIDDING STRUCTURE**

Indicate the type of bidding structure by marking with "X"	
Individual Bidder	
Joint Venture/Consortium	
Company	
Other	

**BIDDING STRUCTURE INFORMATION**

Bidder Information:	
Name of Company	
Registration Number	
VAT Registration Number	
Contact Person	
Telephone Number	
Cellphone Number	
Fax Number	
Email Address	
Postal Address	
Physical Address	

**If Partnership/Joint Venture/Consortium, bidders must provide bidder information for each partner/joint venture member/consortium member.**

<b>APPLICATION FOR TAX CLEARANCE CERTIFICATE (IN RESPECT OF TENDERS)</b>	
	<b>IT IS A CONDITION OF TENDER THAT: –</b>
1.	It is an absolute requirement that the taxes of the successful tenderer must be in order or that suitable arrangements have been made with the Receiver of Revenue to satisfy them.
2.	The Application for Tax Clearance Certificate (in respect of tenders), must be completed by the tenderer in all respects and submitted to the Receiver of Revenue where the tenderer is registered for income tax purposes. The Receiver of Revenue will then furnish the tenderer with a Tax Clearance Certificate that will be valid for a period of twelve (12) months from date of issue. This <b>Tax Clearance Certificate must be submitted in the original with the tender under this section</b> , that is before the closing time and date of the tender. Failure to submit an original and valid Tax Clearance Certificate may invalidate your tender.
3.	Each party to a Consortium/Sub-contractors must complete a separate Tax Clearance Certificate. Copies of the Application for Tax Clearance Certificate are available at any Receiver's Office.

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**APPLICATION FOR TAX CLEARANCE CERTIFICATE  
(IN RESPECT OF BIDDERS)**

1. Name of taxpayer / bidder : .....
2. Trade name: .....
3. Identification number 

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--
4. Company / Close Corporation registration number: 

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--
5. Income tax reference number: 

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--
6. VAT registration number (if applicable): 

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--
7. PAYE employer’s registration number (if applicable): 

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

**Contact person requiring Tax Clearance Certificate:** Signature : .....

**Name :** .....

**Telephone number :** Code: (    ) Number : .....

**Address :** .....

.....

.....

.....

.....

Code : .....

**Date :** .....

PLEASE NOTE

**THE COMMISSIONER FOR THE SOUTH AFRICAN REVENUE SERVICE (SARS) WILL NOT EXERCISE HIS DISCRETIONARY POWERS IN FAVOUR OF ANY PERSON WITH REGARD TO ANY INTEREST, PENALTIES AND/ OR ADDITIONAL TAX LEVIABLE DUE TO THE LATE- OR UNDERPAYMENT OF TAXES, DUTIES OR LEVIES OR THE RENDITION RETURNS BY ANY PERSON AS A RESULT OF ANY SYSTEM NOT BEING YEAR 2000 COMPLIANT**

### DECLARATION OF INTEREST

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

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

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

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

2.2 Identity Number: .....

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

2.4 Company Registration Number .....

2.5 Tax Reference Number: .....

2.6 VAT Registration Number: .....

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

<sup>1</sup>“State” means –

- (a) any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);
- (b) any municipality or municipal entity;
- (c) provincial legislature;
- (d) national Assembly or the national Council of provinces; or
- (e) Parliament.

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



2.7 Are you or any person connected with the bidder presently employed by the state? YES / NO

2.7.1 If so, furnish the following particulars:

Name of person / director / trustee / shareholder/ member: .....
Name of state institution at which you or the person connected to the bidder is employed : .....
Position occupied in the state institution: .....

Any other particulars:
.....
.....
.....

2.7.2 If you are presently employed by the state, did you obtain the appropriate authority to undertake remunerative work outside employment in the public sector? YES / NO

2.7.2.1 If yes, did you attached proof of such authority to the bid document? YES / NO

(Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the bid.

2.7.2.2 If no, furnish reasons for non-submission of such proof:
.....
.....
.....

2.8 Did you or your spouse, or any of the company's directors / trustees / shareholders / members or their spouses conduct business with the state in the previous twelve months? YES / NO

2.8.1 If so, furnish particulars:
.....
.....
.....

2.9 Do you, or any person connected with the bidder, have any relationship (family, friend, other) with a person employed by the state and who may be involved with the evaluation and or adjudication of this bid? YES / NO

2.9.1 If so, furnish particulars.
.....
.....
.....

**2.10** Are you, or any person connected with the bidder, aware of any relationship (family, friend, other) between any other bidder and any person employed by the state who may be involved with the evaluation and or adjudication of this bid? **YES/NO**

2.10.1 If so, furnish particulars.  
 .....  
 .....  
 .....

**2.11** Do you or any of the directors / trustees / shareholders / members of the company have any interest in any other related companies whether or not they are bidding for this contract? **YES/NO**

2.11.1 If so, furnish particulars:  
 .....  
 .....  
 .....

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

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

## 4 DECLARATION

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

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

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 23 OF THE GENERAL CONDITIONS OF CONTRACT SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....  
Signature Date  
.....  
Position Name of bidder

May 2011



Road Traffic  
Management Corporation

**DECLARATION OF BIDDER’S PAST SUPPLY CHAIN MANAGEMENT PRACTICES**

1. This Declaration forms part of the bidding documents and must be completed and submitted by the bidder. Failure to do so may result in the bid being rejected.
2. It serves as a declaration to be used by institutions in ensuring that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system.
3. The bid of any bidder may be disregarded if that bidder, or any of its directors have:-
  - (a) abused the institution’s supply chain management system;
  - (b) committed fraud or any other improper conduct in relation to such system; or
  - (c) failed to perform on any previous contract.

4. In order to give effect to the above, the following questionnaire must be completed and submitted with the bid. ( \*Please circle the applicable Yes or No response below clearly )

4.1 **Is the bidder or any of its directors listed on the National Treasury’s database as companies or persons prohibited from doing business with the public sector?** \*Yes / No

(Companies or persons who are listed on this database were informed in writing of this restriction by the National Treasury after the *audi alteram partem* rule was applied).

4.1.1 If so, state the particulars:  
 .....

4.2 Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)? \*Yes / No

To access this Register enter the National Treasury’s website, [www.treasury.gov.za](http://www.treasury.gov.za), click on the icon “Register for Tender Defaulters” or submit your written request for a hard copy of the Register to facsimile number (012) 3265445.

4.1.2 If so, state the particulars:  
 .....

4.3 Was the bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five years? \*Yes / No

4.3.1 If so, state the particulars:  
 .....

4.4 Was any contract between the bidder and any organ of state terminated during the past five years on account of failure to perform on or comply with the contract? \*Yes / No

4.4.1 If so, state the particulars:  
 .....

## DECLARATION

I, THE UNDERSIGNED (FULL NAME) .....  
 CERTIFY THAT THE INFORMATION FURNISHED IN SECTIONS 4.1, 4.2, 4.3 and 4.4 ABOVE  
 IS TRUE AND CORRECT. I ACCEPT THAT, IN ADDITION TO MY/OUR BID BEING REJECTED  
 AND/OR CANCELLATION OF A CONTRACT, ACTION MAY BE TAKEN AGAINST ME,  
 SHOULD THIS DECLARATION PROVE TO BE FALSE.

..... 2.7.1.1.1 Signature of Declarant	..... 2.7.1.1.2 Bid Number	..... 2.7.1.1.3 Date
..... 2.7.1.1.4 Position of Declarant	..... 2.7.1.1.5 Name of Company / Organisation / Enterprise / Bidder	
<b>Witness 1 :</b> .....		<b>Witness 2 :</b> .....



**ANNEXURE 6 CERTIFICATE OF INDEPENDENT BID DETERMINATION SBD 9 (Page 1)**

**CERTIFICATE OF INDEPENDENT BID DETERMINATION**

I, the undersigned, in submitting the accompanying bid:

---

(Bid Number and Description)

in response to the invitation for the bid made by:

---

(Name of Institution)

do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of: \_\_\_\_\_ that:

(Name of Bidder)

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign the bid, on behalf of the bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:
  - (a) has been requested to submit a bid in response to this bid invitation;
  - (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
  - (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder

**ANNEXURE 6 CERTIFICATE OF INDEPENDENT BID DETERMINATION SBD 9 (Page 2)**

6. The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However communication between partners in a joint venture or consortium<sup>3</sup> will not be construed as collusive bidding.
7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
- (a) prices;
  - (b) geographical area where product or service will be rendered (market allocation)
  - (c) methods, factors or formulas used to calculate prices;
  - (d) the intention or decision to submit or not to submit, a bid;
  - (e) the submission of a bid which does not meet the specifications and conditions of the bid; or
  - (f) bidding with the intention not to win the bid.
8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.
9. The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

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

**ANNEXURE 6 CERTIFICATE OF INDEPENDENT BID DETERMINATION SBD 9 (Page 3)**

10. I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

.....  
Signature

.....  
Date

.....  
Position

.....  
Name of Bidder





**PRICING SCHEDULE**  
**(Professional Services)**

NAME OF BIDDER: .....	BID NO.: .....
CLOSING TIME 11:00	CLOSING DATE.....

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

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

1. The accompanying information must be used for the formulation of proposals.
2. Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project.

R.....

3. PERSONS WHO WILL BE INVOLVED IN THE PROJECT AND RATES APPLICABLE (CERTIFIED INVOICES MUST BE RENDERED IN TERMS HEREOF)

4. PERSON AND POSITION      HOURLY RATE      DAILY RATE

	R-----
	R-----
	R-----
	R-----
	R-----

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

	R-----days
	R-----days
	R-----days
	R-----days

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

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT

TOTAL: R.....

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

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

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT

TOTAL: R.....

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

.....

7. Estimated man-days for completion of project .....

8. Are the rates quoted firm for the full period of contract? \*YES/NO

9. If not firm for the full period, provide details of the basis on which adjustments will be applied for, for example consumer price index.

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

**\*[DELETE IF NOT APPLICABLE]**

---

---

Any enquiries regarding bidding procedures may be directed to the –

(INSERT NAME AND ADDRESS OF DEPARTMENT/ENTITY)

Tel:

Or for technical information –

(INSERT NAME OF CONTACT PERSON)

Tel



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**PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2011**

This preference form must form part of all bids invited. It contains general information and serves as a claim form for preference points for Broad-Based Black Economic Empowerment (B-BBEE) Status Level of Contribution

**NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF B-BBEE, AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS, 2011.**

**1. GENERAL CONDITIONS**

1.1 The following preference point systems are applicable to all bids:

- the 80/20 system for requirements with a Rand value of up to R1 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R1 000 000 (all applicable taxes included).

1.2 The value of this bid is estimated to exceed/not exceed R1 000 000 (all applicable taxes included) and therefore the.....system shall be applicable.

1.3 Preference points for this bid shall be awarded for:

- (a) Price; and
- (b) B-BBEE Status Level of Contribution.

1.3.1 The maximum points for this bid are allocated as follows:

	<b>POINTS</b>
<b>1.3.1.1 PRICE</b>	.....
<b>1.3.1.2 B-BBEE STATUS LEVEL OF CONTRIBUTION</b>	.....
<b>Total points for Price and B-BBEE must not exceed</b>	<b>100</b>

1.4 Failure on the part of a bidder to fill in and/or to sign this form and submit a B-BBEE Verification Certificate from a Verification Agency accredited by the South African Accreditation System (SANAS) or a Registered Auditor approved by the Independent Regulatory Board of Auditors (IRBA) or an Accounting Officer as contemplated in the Close Corporation Act (CCA) together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.

1.5 The purchaser reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the purchaser.

## 2. DEFINITIONS

- 2.1.1 **“all applicable taxes”** includes value-added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies;
- 2.2 **“B-BBEE”** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- 2.3 **“B-BBEE status level of contributor”** means the B-BBEE status received by a measured entity based on its overall performance using the relevant scorecard contained in the Codes of Good Practice on Black Economic Empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- 2.4 **“bid”** means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of services, works or goods, through price quotations, advertised competitive bidding processes or proposals;
- 2.5 **“Broad-Based Black Economic Empowerment Act”** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- 2.6 **“comparative price”** means the price after the factors of a non-firm price and all unconditional discounts that can be utilized have been taken into consideration;
- 2.7 **“consortium or joint venture”** 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;
- 2.8 **“contract”** means the agreement that results from the acceptance of a bid by an organ of state;
- 2.9 **“EME”** means any enterprise with an annual total revenue of R5 million or less .
- 2.10 **“Firm price”** means the price that is only subject to adjustments in accordance with the actual increase or decrease resulting from the change, imposition, or abolition of customs or excise duty and any other duty, levy, or tax, which, in terms of the law or regulation, is binding on the contractor and demonstrably has an influence on the price of any supplies, or the rendering costs of any service, for the execution of the contract;
- 2.11 **“functionality”** means the measurement according to predetermined norms, as set out in the bid documents, of a service or commodity that is designed to be practical and useful, working or operating, taking into account, among other factors, the quality, reliability, viability and durability of a service and the technical capacity and ability of a bidder;
- 2.12 **“non-firm prices”** means all prices other than “firm” prices;
- 2.13 **“person”** includes a juristic person;
- 2.14 **“rand value”** means the total estimated value of a contract in South African currency, calculated at the time of bid invitations, and includes all applicable taxes and excise duties;
- 2.15 **“sub-contract”** means the primary contractor’s assigning, leasing, making out work to, or employing, another person to support such primary contractor in the execution of part of a project in terms of the contract;
- 2.16 **“total revenue”** bears the same meaning assigned to this expression in the Codes of Good Practice on Black Economic Empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act and promulgated in the *Government Gazette* on 9 February 2007;

- 2.17 “**trust**” means the arrangement through which the property of one person is made over or bequeathed to a trustee to administer such property for the benefit of another person; and
- 2.18 “**trustee**” means any person, including the founder of a trust, to whom property is bequeathed in order for such property to be administered for the benefit of another person.

### 3. ADJUDICATION USING A POINT SYSTEM

- 3.1 The bidder obtaining the highest number of total points will be awarded the contract.
- 3.2 Preference points shall be calculated after prices have been brought to a comparative basis taking into account all factors of non-firm prices and all unconditional discounts;.
- 3.3 Points scored must be rounded off to the nearest 2 decimal places.
- 3.4 In the event that two or more bids have scored equal total points, the successful bid must be the one scoring the highest number of preference points for B-BBEE.
- 3.5 However, when functionality is part of the evaluation process and two or more bids have scored equal points including equal preference points for B-BBEE, the successful bid must be the one scoring the highest score for functionality.
- 3.6 Should two or more bids be equal in all respects, the award shall be decided by the drawing of lots.

### 4. POINTS AWARDED FOR PRICE

#### 4.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

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

$$P_s = 80 \left( 1 - \frac{P_t - P_{\min}}{P_{\min}} \right) \quad \text{or} \quad P_s = 90 \left( 1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

Where

$P_s$  = Points scored for comparative price of bid under consideration

$P_t$  = Comparative price of bid under consideration

$P_{\min}$  = Comparative price of lowest acceptable bid

### 5. Points awarded for B-BBEE Status Level of Contribution

- 5.1 In terms of Regulation 5 (2) and 6 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

<b>B-BBEE Status Level of Contributor</b>	<b>Number of points (90/10 system)</b>	<b>Number of points (80/20 system)</b>
1	10	20
2	9	18
3	8	16
4	5	12
5	4	8
6	3	6
7	2	4
8	1	2
Non-compliant contributor	0	0

- 5.2 Bidders who qualify as EMEs in terms of the B-BBEE Act must submit a certificate issued by an Accounting Officer as contemplated in the CCA or a Verification Agency accredited by SANAS or a Registered Auditor. Registered auditors do not need to meet the prerequisite for IRBA's approval for the purpose of conducting verification and issuing EMEs with B-BBEE Status Level Certificates.
- 5.3 Bidders other than EMEs must submit their original and valid B-BBEE status level verification certificate or a certified copy thereof, substantiating their B-BBEE rating issued by a Registered Auditor approved by IRBA or a Verification Agency accredited by SANAS.
- 5.4 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.
- 5.5 A trust, consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.
- 5.6 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.
- 5.7 A person will not be awarded points for B-BBEE status level if it is indicated in the bid documents that

such a bidder intends sub-contracting more than 25% of the value of the contract to any other enterprise that does not qualify for at least the points that such a bidder qualifies for, unless the intended subcontractor is an EME that has the capability and ability to execute the sub-contract.

5.8 A person awarded a contract may not sub-contract more than 25% of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level than the person concerned, unless the contract is sub-contracted to an EME that has the capability and ability to execute the sub-contract.

**6. BID DECLARATION**

6.1 Bidders who claim points in respect of B-BBEE Status Level of Contribution must complete the following:

**7. B-BBEE STATUS LEVEL OF CONTRIBUTION CLAIMED IN TERMS OF PARAGRAPHS 1.3.1.2 AND 5.1**

7.1 B-BBEE Status Level of Contribution: ..... = .....(maximum of 10 or 20 points)

(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 5.1 and must be substantiated by means of a B-BBEE certificate issued by a Verification Agency accredited by SANAS or a Registered Auditor approved by IRBA or an Accounting Officer as contemplated in the CCA).

**8 SUB-CONTRACTING**

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

8.1.1 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 (delete which is not applicable)

**9 DECLARATION WITH REGARD TO COMPANY/FIRM**

9.1 Name of company/firm .....

9.2 VAT registration number : .....

9.3 Company registration number .....

:

9.4 TYPE OF COMPANY/ FIRM

- Partnership/Joint Venture / Consortium
- One person business/sole propriety
- Close corporation
- Company
- (Pty) Limited

[TICK APPLICABLE BOX]



9.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

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

9.6 COMPANY CLASSIFICATION

- Manufacturer
- Supplier
- Professional service provider
- Other service providers, e.g. transporter, etc.  
[TICK APPLICABLE BOX]

9.7 Total number of years the company/firm has been in business? .....

9.8 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBE status level of contribution indicated in paragraph 7 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I / we 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 paragraph 7, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;
- (iv) If the B-BBEE status level of contribution has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –
  - (a) disqualify the person from the bidding 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) restrict the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, 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

**WITNESSES:**

1. ....

.....  
SIGNATURE(S) OF BIDDER(S)

3 .....  
.....

DATE:.....  
**ADDRESS:**.....  
.....  
.....

