SBD 1

PART A
INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE DEPARTMENT OF HOME AFFAIRS					
BID NUMBER:	**DHA20-2026**	CLOSING DATE:	**27 NOVEMBER 2026**	CLOSING TIME:	**11H00**
DESCRIPTION	**APPOINTMENT OF A SERVICE PROVIDER FROM SITA RFB1183 FOR THE ESTABLISHMENT OF AN ICT PORTFOLIO MANAGEMENT OFFICE (PMO) TO DELIVER THE DIGITAL TRANSFORMATION STRATEGY (MICROSOFT-BASED PORTFOLIO MANAGEMENT) FOR A PERIOD OF THIRTY-SIX (36) MONTHS, WITH A POSSIBILITY TO RENEW FOR TWENTY-FOUR (24) MONTHS, SUBJECT TO SATISFACTORY PERFORMANCE OF THE SERVICE PROVIDER AND THE AVAILABILITY OF FUNDS.**				

BID RESPONSE DOCUMENTS MUST BE SUBMITTED ONLINE ON THE ETENDER PORTAL.

THE ONLINE E-TENDER PUBLICATION PORTAL LINK: https://www.etenders.gov.za/

TUTORIAL LINK: https://youtu.be/B7pNseNJYHM

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO		**TECHNICAL ENQUIRIES MAY BE DIRECTED TO:**	
CONTACT PERSON	**Dikeledi Nchaupe** **Rita Prinsloo**	CONTACT PERSON	**Grace Sekhu**
TELEPHONE NUMBER	**(012) 406 7166** **(012) 406 2785**	TELEPHONE NUMBER	**(012) 406 2541**
E-MAIL ADDRESS	Dikeledi.Nchaupe@dha.gov.za Rita.Prinsloo@dha.gov.za	E-MAIL ADDRESS	Grace.Sekhu@dha.gov.za

SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		**OR**	CENTRAL SUPPLIER DATABASE No:	MAAA
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	☐Yes ☐No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?	☐Yes ☐No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]	

QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS

IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?	☐ YES ☐ NO
DOES THE ENTITY HAVE A BRANCH IN THE RSA?	☐ YES ☐ NO
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?	☐ YES ☐ NO
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?	☐ YES ☐ NO
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?	☐ YES ☐ NO

IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.

PART B
TERMS AND CONDITIONS FOR BIDDING

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

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

SIGNATURE OF BIDDER: ……

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

DATE: ……

INSTRUCTIONS TO BIDDERS

1. THE TENDER DOCUMENTS

Rules for Bidding

1.1. The Department is not bound to accept any of the proposals submitted and reserves the right to call for presentations from short-listed bidders before final selection.

1.2. The Department reserves the right to terminate this appointment or temporarily defer the work, or any part thereof, at any stage of completion should the Department decide not to proceed with the tender.

1.3. The Department also reserves the right to appoint any other person to undertake any part of the tasks.

1.4. The service provider must be a single legal entity with all other necessary expertise secured via sub-contract, or under a joint venture or a consortium arrangement. The Department will enter into a single contract with a single entity for the delivery of the work set out in these tender documents.

1.5. The bidding entity shall be the same entity that will execute the bid. Any bid found to be fronting for another entity or entities shall be disqualified immediately.

1.6. All South African firms submitting bids as part of a consortium or joint venture must submit valid original tax clearance certificates.

1.7. All bidders submitting bids as part of joint venture, consortium, **must** submit the following:

i. A Joint Venture, Consortium or Trust agreement signed by all companies forming a Joint Venture, Consortium or Trust.

ii. A valid tax clearance certificate and/ or pin issued by South African Revenue Services (SARS) for all companies that form part of a Joint Venture, Consortium or Trust.

iii. A Central Supplier Database (CSD) Report for all companies that form part of a Joint Venture, Consortium or Trust.

iv. A consolidated SANAS B-BBEE certificate or a consolidated B-BBEE certificate issued by the Companies and Intellectual Property Commission (CIPC).

v. SBD 1, SBD 3, SBD 4, & SBD 6 forms must be completed using the Joint Venture, Consortium or Trust information or the lead partner as indicated on the Joint Venture, Consortium or Trust agreement.

1.8. Foreign firms providing proposals must become familiar with local conditions and laws and take them into account in preparing their proposals.

1.9. The service provider and its affiliates are disqualified from providing goods, works, and services to any private party to this Agreement, or any eventual project that may result, directly or indirectly from these services.

1.10. Firms may ask for clarification on these tender documents or any part thereof up to close of business 1 week before the deadline for the submission of the bids.

1.11. The Department reserves the right to return late bid submissions unopened.

1.12. Firms may not contact the Department on any matter pertaining to their bid from the time when the bids are submitted to the time the contract is awarded. Any effort by a bidder to influence bid evaluation, bid comparisons, or bid award decisions in any manner, may result in rejection of the bid concerned.

1.13. Should the contract between the Department and the service provider be terminated by either party due to reasons not attributable to the service provider, the service provider will be remunerated for the appropriate portion of work completed up to a maximum amount of not more than the total fee bid by the service provider for the appropriate phase of the project during which the appointment was terminated.

Conditions of the Tender

1.14. The General Conditions of contract will apply.

1.15. The Department will become the owner of all information, documents, programmes, advice, and reports collected and compiled by the service provider in the execution of this tender.

1.16. The copyright of all documents, programmes, and reports compiled by the service provider will vest in the Department and may not be reproduced or distributed, or made available in any other way without the written consent of the Department.

1.17. All information, documents, programmes, and reports must be regarded as confidential and may not be made available to any unauthorised person or institution without the written consent of the Department.

1.18. Bidders shall undertake to limit the number of copies of this document and destroy them in the event of their failure to secure the contract.

1.19. The service provider is entitled to general knowledge acquired in the execution of this agreement and may use it, provided that it shall not be to the detriment of the Department.

Processing of the Bidder's Personal Information

1.20. All personal information of the Bidder, its employees, representatives, associates, and sub-contractors ("Bidder Personal Information") required under this bid is collected and processed to assess the strength and competitiveness of the proposal. The evaluation and award of the contract shall be conducted following applicable legislation, policies, and standards. The Bidder is advised that Bidder Personal Information may be passed on to third parties to whom DHA is compelled by law to provide such information. For example, where appropriate, DHA is compelled to submit information to the National Treasury's Database of Restricted Suppliers.

1.21. All Personal Information collected will be processed under Protection of Personal Information Act (POPIA).

1.22. The following persons will have access to the Personal Information that has been collected:

a) DHA personnel participating in procurement/award procedures; and

b) Members of the public: when the bid is awarded, some of the following information will have to be made available on the National Treasury's e-Tender portal and DHA website:

- Contract description and bid number

- Names of the successful bidder(s) and preference points claimed
- The contract price(s) (if possible)
- Contract period
- Names of directors; and
- Date of completion/award

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

Cost of Bidding

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

Content of Tender Documents

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

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

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

Clarification of Tender Documents

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

1.28. **Briefing session.**

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

Date and time: Friday, 13 November 2026 at 10h00 to 11h00.
https://teams.microsoft.com/meet/3119597271463509?p=JaxajPjuM4AdG00iZE

Amendment of Tender Documents

1.29. At any time prior to the deadline for submission of bids, the Department may, for any reason, whether at its own initiative or in response to a clarification requested by a prospective bidder, modify the tender document by amendment.

1.30. All prospective bidders who have received the tender document will be notified of the amendment in writing or by fax, and same will be binding on them.

1.31. In order to allow prospective bidders reasonable time in which to take the amendment into account in preparing their bids, the Department, at their discretion, may extend the deadline for the submission of bids.

2. PREPARATION OF BIDS

Language of Bid

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

Documents Constituting the Bid

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

a) Completed Invitation to Bid DHA20-2026 document

b) Letter of Authority

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

c) General Conditions of contract

d) CSD report

e) Company's profile

f) Response to TOR requirements

- Pre-qualification criteria evaluation
- Mandatory requirements evaluation
- Functionality requirements evaluation

g) SANAS B-BBEE Certificate/ Sworn Affidavit/ DTIC B-BBEE

Bid Prices

2.3 Prices indicated on the Price Schedule shall be the total price of services including, where applicable:

- All duties and other taxes;
- The price of transportation, insurance, and other costs incidental to the delivery of the services to their final destination;

- The price of any other incidental services required in terms of the tender deliverables;

2.4 Prices quoted by the Bidder shall be fixed during the Bidder's performance of the Contract and not subject to variation on any account.

2.5 A bid submitted with a variable price quotation will be treated as non-responsive and rejected.

2.6 Prices shall be quoted in South African Rands.

2.7 The Department has limited resources and bids must be competitive, with market-related pricing, as this will be one of the deciding factors in the final award of the contract.

Period of Validity of Bids

2.8 Bids shall remain valid for 90 days after the closing date of the bid prescribed by the Department. A bid valid for a shorter period shall be rejected by the Department as non-responsive.

2.9 In exceptional circumstances, the Department may solicit the Bidder's consent to an extension of the period of validity. The request and the response thereto shall be made in writing. A Bidder may refuse the request. A Bidder granting the request will not be required nor permitted to modify its bid.

Format and Signing of Bid

2.10 The Bidder shall prepare one copy of the Technical Bid and Financial Bid separately, clearly marking each "Original Technical Bid" and "Original Financial Bid", as appropriate.

2.11 The original bid shall be typed or written in indelible ink and shall be signed by the Bidder or a person or persons duly authorized to bind the Bidder to the Contract. All pages of the bid, except for un-amended printed literature, shall be initialed by the person or persons signing the bid.

2.12 Any interlineations, erasures, or overwriting shall be valid only if they are initialed by the person or persons signing the bid.

2.13 Faxed or emailed or hardcopy bids will not be accepted. **Bid response documents must be submitted online on the eTender portal.**

2.14 Non-compliance with online bid submission WILL invalidate the bidder's response.

Closing Date of Bids

2.15 Bids (Technical and Financial) must be received through e-submission as specified under clause 2.13 above.

2.16 The Department may, at its discretion, extend this deadline for submission of bids by amending the bid documents in which case all rights and obligations of the Department and Bidders previously subject to the deadline will thereafter be subject to the deadline as extended.

Late Bids

2.17 No bids will be received after the deadline for submission of bids.

Modification of Bids

2.18 No bid may be modified subsequent to the deadline for submission of bids.

3. EVALUATION OF BIDS

Clarification of Bids

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

Preliminary Examination

3.2. The Department will examine the bids to determine whether they are complete, whether they meet all the conditions of the Contract and Technical Specifications and whether any computational errors have been made, whether the documents have been properly signed, and whether the bids are generally in order.

3.3. Arithmetical errors will be rectified on the following basis. If there is a discrepancy between the unit price and the total price that is obtained by multiplying the unit price and quantity, the unit price shall prevail and the total price shall be corrected. If there is a discrepancy between words and figures, the amount in words shall prevail. If the supplier does not accept the correction of errors, its bid may be rejected.

3.4. If a bid is not responsive and not fulfilling all the conditions of the Contract and not meeting Technical Specifications, it will be rejected by the Department and may not subsequently be made responsive by the Bidder by correction of the non-conformity.

Evaluation and Comparison of Bids

3.5. The Department will evaluate and compare the financial bids only of those Bidders whose Technical Bid has been accepted by the Department.

3.6. The Department's evaluation of a financial bid will take into account information to be provided on the SBD 3 and/ or pricing schedule/ fee structure where applicable.

Contacting the Department

3.7. Subject to clause 3.1 above, no Bidder shall contact the Department on any matter relating to its bid, from the time of the bid opening to the time the Contract is awarded. If the bidder wishes to bring additional information to the notice of the Department, it should do so in writing.

3.8. Any effort by a Bidder to influence the Department in its decisions on bid evaluation, bid comparison or contract award may result in rejection of the Bidder's bid.

4. AWARD OF CONTRACT

Post qualification

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

4.2. The determination will take into account the Bidder's financial, technical and production capabilities. It will be based upon an examination of the documentary evidence of the Bidder's qualifications submitted by the bidder, as well as such other information as the Department deems necessary and appropriate.

4.3. An affirmative determination will be a prerequisite for award of the Contract to the Bidder. A negative determination will result in rejection of the Bidder's bid, in which event the Department will proceed to the next highest evaluated bid to make a similar determination of that Bidder's capabilities to perform the contract satisfactorily.

Department's right to vary Quantities at Time of Award

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

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

4.5. The Department reserves the right to:

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

Notification of Award

4.6. Prior to the expiration of the period of bid validity, the Department will notify the successful bidder in writing that its bid has been accepted.

4.7. The notification of award will constitute the formation of the Contract.

Signing of Contract

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

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

Termination of Service

4.10. In case of any failure to comply with any of the conditions of the contract or unsatisfactory rendering of service, the stipulation of the General Conditions of Contract and the Special Conditions of Contract, shall be applicable.

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

Unsatisfactory Performance

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

Assignment

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

home affairs
Department:
Home Affairs
REPUBLIC OF SOUTH AFRICA

TERMS OF REFERENCE

DHA20-2026

APPOINTMENT OF A SERVICE PROVIDER FROM SITA RFB1183 FOR THE ESTABLISHMENT OF AN ICT PORTFOLIO MANAGEMENT OFFICE (PMO) TO DELIVER THE DIGITAL TRANSFORMATION STRATEGY (MICROSOFT-BASED PORTFOLIO MANAGEMENT) FOR A PERIOD OF THIRTY-SIX (36) MONTHS, WITH A POSSIBILITY TO RENEW FOR TWENTY-FOUR (24) MONTHS, SUBJECT TO SATISFACTORY PERFORMANCE OF THE SERVICE PROVIDER AND THE AVAILABILITY OF FUNDS

CLOSING DATE AND TIME OF BID:

27 November 2026 at 11h00

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

Date and time: Friday, 13 November 2026 at 10h00 to 11h00

Link to the virtual meeting

https://teams.microsoft.com/meet/3119597271463509?p=JaxajPjuM4AdG00iZE

DISCLAIMER

The Department of Home Affairs (DHA)'s bid documents and tender processes are free of charge. DHA will not call or send any official to demand payment for tender services.
Be advised that all tender notices, bids received, and awards are published on www.dha.gov.za & www.etenders.gov.za
The Department requests all suppliers and the business communities out there to be vigilant around matters of procurement and if in doubt, do not hesitate to contact the contact persons on the relevant procurement document or the department.

BID VALIDITY PERIOD: 90 DAYS

Department of Home Affairs

Supply Chain Management

TERMS OF REFERENCE

OBJECTIVES

1. The objectives (aim) of this tender are:

   To invite bids from suitable service provider(s) to

   - Develop a DHA ICT PMO Framework (policy, standards, processes, stage-gates) aligned to recognised best practices (project, programme, and portfolio levels) and explicitly mapped to DHA's Digital Transformation strategy and roadmaps.
   - Establish and resource the ICT PMO with a practical operating model, including role profiles, skills, resourcing/augmentation plan, and capability transfer.
   - Configure and customise the Department's existing Microsoft tools and applications (using Microsoft licences provided by DHA) into an integrated Digital Transformation PMO system for end-to-end portfolio management (intake to benefits realisation), including Microsoft Planner (Work Planner) and Project Portfolio Management (PPM) capabilities. A standalone or third-party PMO system will not be accepted.
   - Improve governance, compliance, and auditability (PFMA, Treasury Regulations, POPIA, and internal policies).
   - Provide executive transparency through dashboards and reports to track Digital Transformation outcomes, benefits, and value realisation.

BACKGROUND

2. The Department of Home Affairs (DHA) is a mission-critical institution at the centre of South Africa's national identity, security, and service-delivery ecosystem. As the custodian of civic services, immigration management, population data, and national identity systems, the DHA depends heavily on reliable, modern, secure, and integrated ICT capabilities to fulfil its mandate. Over the past decade, the rapid increase in digital service expectations, cyber-security risks, and data-driven governance requirements has intensified the need for a coordinated and strategic ICT transformation approach.

   Historically, DHA's digital initiatives have been implemented through disparate projects spread across different branches and functions. While many of these initiatives have delivered value, the absence of a centrally governed Portfolio Management Office (PMO) has resulted in several systemic challenges, including:

   - Fragmented ICT planning and prioritisation, leading to overlapping initiatives and duplication of effort.
   - Inconsistent project delivery practices, with varying levels of documentation, governance, risk management, and reporting.
   - Limited visibility of the full ICT investment landscape, making it difficult to manage budgets, resources, and interdependencies effectively.
   - Difficulty scaling digital services, due to siloed systems, legacy technologies, and lack of a unified architectural roadmap.
   - Heightened cyber-security and data-privacy risks, exacerbated by uncoordinated technology adoption.

- Increasing citizen demand for digital, seamless, and accessible services, which requires coordinated transformation rather than isolated ICT upgrades.

As DHA advances major strategic programmes—including the Modernisation Programme, the National Identity System (NIS), Electronic Travel Authorisation, Secure border management technologies, automated immigration systems, and interfaces with other departments—there is a critical need for a central structure that ensures alignment, oversight, and cohesive execution.

A dedicated ICT Digital Transformation Portfolio Management Office provides exactly this capability.

The PMO would serve as the strategic governance and execution engine that:

- Aligns ICT investments with DHA's strategic objectives and national government priorities.
- Ensures disciplined and standardised project, programme, and portfolio management practices.
- Enables holistic prioritisation, planning, budgeting, and resource allocation.
- Manages interdependencies between complex digital platforms, ensuring interoperability and architectural coherence.
- Provides clear oversight, reporting, and transparency to executives, stakeholders, and partners such as SITA.
- Strengthens risk management, compliance, and cyber-security across all ICT initiatives.
- Accelerates delivery of digital services and improves the citizen experience through coordinated transformation.

In a rapidly evolving digital landscape—where identity systems, immigration security, and public service platforms must be robust, secure, and integrated—the establishment of an ICT Digital Transformation PMO is no longer optional. It is a strategic enabler that ensures the DHA can deliver world-class digital services, strengthen national security, and meet the expectations of citizens, businesses, and government partners.

The Department of Home Affairs (DHA) is embarking on a multi-year Digital Transformation strategy to modernise critical services, enhance citizen experience, and improve operational efficiency.

To enable effective delivery and oversight of the Digital Transformation portfolio, DHA seeks to establish a modern, fit-for-purpose ICT Portfolio Management Office (PMO).

The successful service provider (the Service Provider) must configure and customise the Department's existing Microsoft tools and applications, using Microsoft licences provided by DHA, to standardise governance, automate workflows, improve visibility of benefits and risks, and enable data-driven decision-making for effective portfolio management aligned to the Digital Transformation strategy. The Department does not require a standalone PMO system.

SCOPE AND EXTENT OF THE TENDER

3. The successful bidder(s) will be expected to execute and conduct the following tasks for/ provide the following services/items to the Department:
    - Portfolio Management Framework Development - Draft and finalise a DHA ICT PMO Framework comprising policy, methodology, governance processes, standards, procedures, RACI, and stage-gate criteria. Explicitly align the framework to the Digital Transformation portfolio, ICT Strategy, DPSA Project Management Framework and Enterprise Architecture Principles.
    - **PMO Resourcing** - Define the target organisation design, role descriptions, competency matrix, and provide an initial resourcing/augmentation plan for the first 12–18 months, including knowledge transfer and change management.
    - Templates and Artefacts: Develop a complete, version-controlled template suite (Feasibility study, business case, Projects Initiation Document/charter, schedule, RAID, change control, steering committee packs, monthly status, benefits realisation templates and register) to ensure full compliance with governance processes and audit requirements.
    - **Microsoft Platform Configuration: Configure**, customise and extend Microsoft 365 collaboration stack—specifically Microsoft Planner (Work Planner), Microsoft Project (Project for the web / Planner Premium), Power Platform (Power Apps, Power Automate, Power BI), SharePoint Online/Teams—for unified demand, project and portfolio management.
    - **Requirements Analysis and Customisation:** Conduct a detailed requirements analysis with DHA stakeholders and customise the Microsoft tools and applications to meet DHA's documented Digital Transformation PMO requirements. Customisation includes, at a minimum, DHA-specific stage-gates and approval workflows; demand/intake, business case and stage-gate forms; the Dataverse data model; role-based security; Digital Transformation KPIs; benefits and financial tracking; and Power BI dashboards. A standard (out-of-the-box) deployment of Microsoft tools that is not customised to DHA's requirements will not be accepted.
    - **Testing and Acceptance**: Test the customised system against the DHA-approved requirements (system, integration and user acceptance testing) and provide a requirements traceability matrix showing how each requirement has been met and tested.
    - **Portfolio Governance:** Implement demand/intake and strategic alignment scoring, prioritisation, business case workflows, stage gates, RAID, dependency/resource management, benefits and financial tracking, with traceability to Digital Transformation outcomes.
    - **Reporting & Analytics:** Establish a Power BI portfolio dashboard suite (executive, portfolio, programme, project) including KPIs, heatmaps, financials, benefits tracking, and Objectives and Key Results (OKR) alignment, with a data dictionary and refresh processes.
    - **Data Management & Migration:** Define data model (Dataverse) and migrate legacy registers and documents from existing tools where applicable.
    - **Training & Change Management:** Role-based training, quick reference guides, and adoption activities covering the PMO Framework, templates, and Microsoft tools (Planner/Work Planner, Project, Power Apps).

- **Support & Maintenance:** Post go-live hypercare (stabilisation) support, knowledge transfer, and a support model with SLAs.
- **PMO Operations:** Provide and manage the professional resources listed in paragraph 6.5 (Table B) to operate the ICT PMO on-site for the duration of the contract, while transferring skills to DHA officials so that the PMO can be sustained internally.

SPECIAL CONDITIONS OF CONTRACT

4. To achieve the above, the successful bidder will be required to meet the following requirements:
   - The service provider(s) may not recruit or shall attempt to recruit an employee of the Department of Home Affairs for the purposes of preparation of bid or for the duration or the execution of this contract or any part thereof.
     a) The successful service provider will be required to meet minimum security clearance standards in line with the Minimum Information Security Standard (MISS).
     b) Proof of registration with applicable professional bodies will be required.
     c) The solution must be built entirely by configuring and customising Microsoft 365 / Office 365 and Power Platform tools and applications already in use or to be provisioned by DHA. A standalone, separately hosted or third-party PMO system will not be accepted.
     d) The solution must be deployed in DHA's existing Microsoft 365 (Office 365) tenant and use DHA's identity platform (Microsoft Entra ID). No separate tenant, external hosting or third-party identity store may be used without DHA's prior written approval.
     e) Portfolio solution using Microsoft Project for the web / Planner Premium, and/or Power Apps (model-driven, on Dataverse) configured for demand, project and portfolio records.
     f) Microsoft Planner (Work Planner) for task planning and team coordination where appropriate, integrated with portfolio views.
     g) Power Platform: Power Apps (model- or canvas-driven) for intake and governance apps; Power Automate for workflows; Power BI for analytics;
     h) SharePoint Online/Teams for document management, collaboration, and stage-gate artefacts.
     i) Role-based security, environment strategy (Dev/Test/Prod) and application lifecycle management using Power Platform solutions and pipelines.
     j) The Bidder must provide experienced professionals with relevant qualifications throughout the contract.
     k) The key personnel named in the bid must be the personnel deployed on the contract. A key person may only be replaced with DHA's prior written approval, by a person with equal or better qualifications and experience, at no additional cost to DHA.
     l) All deliverables, configurations, applications, workflows, reports, templates, data and documentation produced under this contract are the property of DHA. All solution components and data must reside in DHA's Microsoft 365 tenant.
     m) DHA will provide all Microsoft licences required for the PMO system (for example Microsoft 365 / Office 365, Planner Premium / Project, Power Apps, Power Automate and Power BI). The service provider must not supply,

resell or price any software licences, and must not introduce any third-party product, add-on, connector or accelerator that requires its own licence or subscription. Any reusable templates or components the service provider brings must be delivered as Power Platform solutions owned by DHA, free of licence fees.

n) Configuration and customisation may only start once DHA has approved the requirements specification and the solution design. The customised system will only be accepted after DHA has signed off user acceptance testing against the approved requirements. Defects found during testing and hypercare must be corrected at no additional cost to DHA.

The Bidder is required to be accredited on the SITA RFB 1183/2022 for the following services:

A. ICT Management Services
   1. ICN no. 81112011-0005 ICT Management Services – Project Management

B. BUSINESS SOLUTION MANAGEMENT SERVICES
   1. ICN no. 81112011-0044 Business Solution Implementation – Operational Procedure Development

C. APPLICATION DEVELOPMENT SERVICES
   1. ICN no. 81112011-0045 Application Development Services – Analysis Services
   2. ICN no. 81112011-0046 Application Development Services – AI, IoT, DevOps and Integration Provision Services

D. ICT SERVICE SUPPORT
   1. ICN no. 81112011-0050 ICT Services Support Management - Incident Management

E. PLANNING AND ORGANISATION
   1. ICN 81112011-0021 Information Technology Consulting Services- Architecture and Governance

TENDER DELIVERABLES / OUTPUTS AND TIMEFRAMES

5. The primary deliverables to be achieved:
   a) ICT PMO Framework: Policy, methodology, governance processes, RACI, stage-gate criteria, and operating procedures (draft and final), including explicit mapping to Digital Transformation objectives and benefits.
   b) PMO Organisation & Resourcing Pack: Org design, role profiles, competency matrix, resourcing/augmentation plan, and knowledge transfer plan.
   c) Gap analysis of current PMO resources, with recommended training.
   d) Template Suite: All governance and delivery templates with guidance notes and version control in SharePoint.
   e) Configured and customised Microsoft PMO Solution, meeting the DHA-approved requirements: environments, security, apps, flows, data model, Planner/Work Planner usage patterns, and Project/PPM configuration.
   f) Migration Plan and Executed Migration with reconciliation report.

g) Power BI Dashboard Pack with KPI catalogue and data dictionary, including Digital Transformation KPIs and benefits tracking.
h) Training Materials, Adoption Plan, and Training Completion Report.
i) Operations Manual and Knowledge Transfer.
j) Projects and Program financial management, including work effort management.
k) Ability to manage Epics, User Stories, Product Backlog, Sprints and sprints Backlog using Agile methodology.
l) Consistent application of Quality Management Metrics for product delivery.
m) Demand Management.
n) Provide central visibility of Portfolio to relevant stakeholders.
o) Standardise product delivery tasks using Agile Scrum.
p) Automate manual processes in the ICT Digital Transformation Portfolio Management Office and produce standard reports and analytics.
q) Create portfolio and project dashboards.
r) Change and Risk Management
s) Requirements Specification: detailed DHA Digital Transformation PMO requirements, signed off by DHA.
t) Solution Design Document: how the Microsoft tools and applications will be configured and customised to meet each requirement, approved by DHA before build starts.
u) Test Plan, User Acceptance Testing (UAT) sign-off and Requirements Traceability Matrix.

Indicative timeframes: The timeframes below are indicative. Final dates will be agreed in the approved project plan at inception. Once-off deliverables are accepted in writing by DHA before payment.

#	Deliverable	Indicative timeframe (from contract commencement)
1	Inception report and detailed project plan	Within 1 month
c)	Gap analysis of current PMO resources	Within 2 months
s)	Requirements Specification (signed off by DHA)	Within 2 months
t)	Solution Design Document (approved before build)	Within 3 months
a)	ICT PMO Framework	Draft within 3 months; final within 4 months
b)	PMO Organisation & Resourcing Pack	Within 3 months
d)	Template Suite	Within 4 months
u)	Test plan, UAT sign-off and requirements traceability matrix	UAT sign-off before go-live, within 6 months
e), g)	Configured and customised Microsoft PMO Solution and Power BI Dashboard Pack (go-live)	Within 6 months
f)	Migration Plan and executed migration with reconciliation report	Plan within 4 months; migration within 7 months

#	Deliverable	Indicative timeframe (from contract commencement)
h)	Training materials, adoption plan and training completion report	Training from month 6; completion report within 9 months
i)	Operations manual and knowledge transfer	Manual within 9 months; final knowledge-transfer close-out 3 months before contract end
j) – r)	PMO operational services, portfolio reporting and dashboards	Ongoing, with monthly reporting from month 3

LOGISTICS AND TIMING

6. Project location, commencement date, duration, submission of bids and fee structure.

6.1. **Project location(s):**

- The service provider will execute the Portfolio Management Office functions in the DHA Head Office 230 Johannes Ramokhoase Street, Pretoria, Gauteng.

6.2. **Expected commencement date:**

- The contract will commence following the awarding of the tender, upon receipt of the signed acceptance letter and the completed SBD 7.2 form from the appointed service provider(s).

6.3. **Project period:**

- The contract will be for the period of thirty-six (36) months, with a possibility to renew for twenty-four (24) months, subject to satisfactory performance of the service provider and the availability of funds.

6.4. **Bid proposal**

- The service provider must provide a properly referenced bid proposal in response to this TOR document with clear headings and information required to evaluate the bid against the requirements stipulated in this TOR document. The bid proposal response must indicate the following:
  - The bidding company's profile, including proof of compliance with all the requirements as per the TOR document.
  - The pricing information. Bid price must include VAT and should be fully inclusive to deliver all goods / services indicated in the terms of reference.
  - Where substantiations are required, a copy of certification or proof is required to be attached to the bid response.
- Bid documents **must** be submitted online on the National Treasury's E-tender portal. Bidders must ensure that their bids are uploaded timeously to the correct portal. The department will not take any responsibility for late uploaded bids. The e-tender portal is open from the day the tender is advertised until the closing date and time.

Bidders are required to ensure that their status reflects "**Submitted**" before the closing time as they will not have access once the tender is closed.

- The online e-Tender publication portal can be accessed on the following link: https://www.etenders.gov.za/
- Manual or hardcopy bids will not be accepted.
- Bidders to adhere to all the rules for the online bid submission.
- Bidders' attention is drawn to the sequential submission format as per the checklist.
- Non-compliance with online bid submission WILL invalidate the bidder's response.

6.5. **Fee structure**

- The service provider must provide a cost breakdown in line with the pricing schedule below. All amounts must be in South African Rand. The total in Table C (line E) must match the bid price on the SBD 3.3 pricing schedule and will be used for price evaluation.

Table A: Fee structure (Solution)

#	Item	Description (Microsoft tools/applications to be configured)	Year 1 (R)	Year 2 (R)	Year 3 (R)	Total (R)
A1	Requirements analysis, solution design, configuration and customisation of DHA's Microsoft tools into the PMO system, including testing (once-off)	Name of solution: ……				
A2	Implementation, including data migration and go-live (once-off)					
A3	Training and change management (once-off)					
A4	Maintenance and support of the configured system (annual, after go-live)					
Sub-total A (excluding VAT)						

Please note that the Department is licensed to Office 365, and as such service providers must propose a PMO tool/solution, stating the name of the solution, which will be aligned with or compatible with it.

The Department will provide the Microsoft licences. The PMO solution must therefore be configured and customised using the Department's Microsoft tools and applications (Microsoft 365 / Office 365, Planner Premium / Project, SharePoint Online, Teams, Power Apps, Power Automate, Power BI and Dataverse). Standalone, separately hosted or third-party PMO systems will not be accepted.

Bidders must (i) state the name of the proposed solution in Table A; (ii) list the Microsoft tools and applications it will use and how they will be configured; and (iii) state, for information only, the Microsoft licence types and estimated quantities the Department must provision. Licence costs must NOT be included in the bid price.

Table B: Fee structure (Resources)

Year amount = Qty × estimated hours per year × hourly rate for that year. Annual escalation applied to the Year 2 and Year 3 hourly rates: …… % (to be stated by the bidder).

Professional resource	Qty	Est. hours per year (per resource)	Hourly rate Year 1 (R, excl. VAT)	Year 1 (R)	Year 2 (R)	Year 3 (R)	Total (R)
PMO Technical Lead	1	1 760					
Technical Project Manager	2	1 760					
Project Administrator	2	1 760					
Change Lead	1	1 760					
Reporting Analyst	1	1 760					
Sub-total B (excluding VAT)							

Table C: Price summary

Ref	Description	Amount (R)
A	Sub-total A: Solution (Table A)	
B	Sub-total B: Resources (Table B)	
C	Total excluding VAT (A + B)	
D	VAT at 15%	
E	**Total bid price including VAT for 36 months (C + D)**	

Pricing conditions:

- The estimated hours in Table B are provided by DHA for price comparison only and are based on full-time, on-site resources (8 hours × 220 working days per year). DHA does not guarantee these hours.
- Resources will be paid monthly in arrears for actual hours worked, supported by timesheets approved by DHA, at the tendered hourly rates.
- Item A1 will only be paid after DHA has signed off user acceptance testing of the customised system against the approved requirements. Items A2 and A3 will be paid on DHA's written acceptance of the related deliverables in paragraph 5. Maintenance and support (A4) will be paid monthly or quarterly in arrears from go-live.
- DHA will provide all Microsoft licences. No licence, subscription or third-party software costs may be included in the bid price.
- Prices are firm for each contract year. No escalation other than that stated in the pricing schedule will be accepted.
- All items must be priced. An item left blank will be deemed to be included in other prices at no additional cost to DHA.
- Pricing for the optional twenty-four (24) month renewal period does not form part of this evaluation. Any renewal will be negotiated in accordance with applicable Supply Chain Management prescripts.

EVALUATION STAGES

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

Stage	Description	Applicable for this bid
Stage 1A	Non-compulsory virtual briefing session	Yes
Stage 1B	Initial screening process / compliance with bid requirements	Yes
Stage 2	Pre-qualification criteria evaluation	Yes
Stage 3	Mandatory requirements evaluation	Yes
Stage 4	Functionality requirements evaluation	Yes
Stage 5	Price / Specific goals evaluation	Yes

Stage 1A: Briefing session

- Non-compulsory virtual briefing session will be held.

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

- Verification of bidder's compliance with bid requirements.

No.	Compliance Checklist	Yes / No
1.	The bidder is registered on the National Treasury Central Suppliers Database (CSD).	
2.	The bidder is in business (as indicated on CSD).	

No.	Compliance Checklist	Yes / No
3.	The bidder is not a restricted supplier/ or does not have a restricted director(s) (as indicated on CSD).	
4.	The bidder is Tax Compliant as indicated on CSD	
5.	The bidder is not a government employee (as indicated on CSD).	
6.	The bidder completed SBD 1 Form in full together with the letter of authority.	
7.	The bidder completed SBD 4 Form in full and did not reveal any information or past practices that prohibits the supplier from conducting business with the state.	
8.	The bidder is accredited on SITA RFB1183 for all the services (ICNs) listed in paragraph 4.1	

Stage 2: Pre-qualification criteria evaluation.

- Compliance with pre-qualification requirements. Bidders who fail to meet the pre-qualification requirements will be disqualified.

Pre-qualification Requirement	Comply	Do not comply
The Bidder must confirm that they will adhere to all the stipulated terms of reference indicated above		
EVIDENCE: Bidder(s) must sign and date on the table below as confirmation:		

Signature: ……..

Date:……

Stage 3: Mandatory requirements evaluation.

- Compliance with the mandatory requirements. Bidders who fail to meet the mandatory requirements will be disqualified.
- Bidders must indicate their compliance with the following mandatory requirement(s) as required by the DHA.
- Only bidders who have complied with mandatory requirements will be evaluated for functionality (Stage 4).
- The Bidder must complete the tables below and sign confirming in writing the name and surname of the professional person, (no repeat of professional's names and surnames will be accepted) for mandatory requirement 1.
- The bidder must sign confirming in writing the Solution for mandatory requirement 2.

Mandatory requirement 1	Comply	Do not comply
The bidder must indicate name and surname of each professional person.		
Evidence: table completed, signed and dated below		

#	Professional Person	Name and surname of professional person
1.	PMO Technical Lead	
2.	Technical Project Manager	
3.	Technical Project Manager	
4.	Project Administrator	
5.	Project Administrator	
6.	Change Lead	
7.	Reporting analyst	

Signature: ……..

Date:……

Mandatory requirement 2	Comply	Do not comply
The bidder confirms that the proposed PMO system will be configured and customised solely on the Department's Microsoft 365 / Office 365 and Power Platform tools and applications, using Microsoft licences provided by the Department, and that it is not a standalone, separately hosted or third-party system.		
Evidence: signed and dated confirmation below		

Signature: ……..

Date:……

Stage 4 – Functionality requirements evaluation

- Bidders who comply with the mandatory requirements will be evaluated for functionality according to the criteria and weights below.
- **The minimum qualifying score for functionality is 70 out of 100 points.** Bidders who score less than 70 points will be disqualified and will not be evaluated further for price and specific goals.
- Bidders must submit the evidence listed for each criterion. Information that cannot be verified will not be scored. DHA reserves the right to contact referees and to invite bidders who meet the threshold to a presentation or demonstration to verify the information submitted; such a presentation will not be scored separately.

Functionality criteria

#	Criteria	Evidence	Scoring guide	Weight
1.	Company experience in establishing or operating an ICT PMO / portfolio management office	Signed and dated reference letters on client letterhead, not older than five (5) years from the closing date of this bid, stating the scope of work performed in establishing an ICT PMO, an acceptable/satisfactory level of performance and the client's contact details. Reference letters older than five (5) years will not be considered.	• 5 or more references = 50 • 4 references = 40 • 3 references = 30 • 2 references = 20 • 1 reference = 10 • No relevant information = 0	50
2	PMO Technical Lead years of ICT project/programme management experience.	CV with dates or years.	• 15 years or more = 25 • 12 to 14 years =20 • 9 to 11 years = 15 • 6 to 8 years = 10 • 3 to 5 years = 5 • Less than 3 years = 0	25
3.	A project plan addressing all the tender deliverables, with timelines aligned to the indicative timeframes, governance and reporting, risk and quality management, knowledge and skills transfer, and exit/handover.	Project plan	• All deliverables addressed in detail, realistic timelines, clear governance, risk, skills transfer and exit plan = 25 • All deliverables addressed, with minor gaps in detail = 20 • Most deliverables addressed; plan is generic = 15 • Several deliverables not addressed = 10 • Vague plan with no meaningful plan = 5 • Not submitted = 0	25

#	Criteria	Evidence	Scoring guide	Weight
TOTAL				**100**

Stage 5– Price and Specific Goals evaluation

- Bidders will further be evaluated in accordance with the prescripts of the Preferential Procurement Policy Framework Act (PPPFA) and the associated Preferential Procurement Regulations of 2022, which stipulate an 80/20 point split for requirements with a Rand value equal to or below R 50 000 000, inclusive of all applicable taxes.
- A valid SANAS B-BBEE Status Level Verification certificate or a B-BBEE certificate issued by the Companies and Intellectual Property Commission, with the exception of EME's and QSE's who are required to submit sworn affidavit in terms of Code of Good Practice. The sworn affidavit must be signed by the EME representative and attested by a Commissioner of oath.
- As bids are only invited for requirements with a Rand value equal to or below R 50 000 000 inclusive of all applicable taxes, the 80/20 system shall be applicable and will be calculated as follows:

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

Specific goals

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

Specific goals allocated points in terms of this tender	Allocated Preference points	Evidence
The company owned / director/s / shareholders by people who are Black. • 100% company owned by people who are Black = **7 points** • ≥51% and <100% company owned by people who are Black = **5 points** • >0% and <51% company owned by people who are Black = **2 points** • 0% company owned by people who are Black = **0 points**	7	Proof of claim as declared on SBD 6.1 in verifying the tenderer's status. The following must be submitted as proof of claim as declared on SBD 6.1 for the specific goals: • Company Registration Certification as issued by the Companies and Intellectual Property Commission (CIPC).

Specific goals allocated points in terms of this tender	Allocated Preference points	Evidence
		• Sworn Affidavit or valid B-BBEE Certificate or Consolidated B-BBEE certificate for Consortium, Joint Venture, or Trust.
The company owned / director/s / shareholders by people who are Women. • 100% company owned by people who are Women **= 10 points** • ≥51% and <100% company owned by people who are Women = **7 points** • >0% and <51% company owned by people who are Women = **2 points** • 0% company owned by people who are Women = **0 points**	10	Proof of claim as declared on SBD 6.1 in verifying the tenderer's status. The following must be submitted as proof of claim as declared on SBD 6.1 for the specific goals: • Company Registration Certification as issued by the Companies and Intellectual Property Commission (CIPC). • Sworn Affidavit or valid B-BBEE Certificate or Consolidated B-BBEE certificate for Consortium, Joint Venture, or Trust.
The company owned / director/s / shareholders by people who are Disabled. • 100% company owned by people who are Disabled = **3 points** • ≥51% and <100% company owned by people who are Disabled = **2 points** • >0% and <51% company owned by people who are Disabled = **1 points** • 0% company owned by people who are Disabled = **0 points**	3	Proof of claim as declared on SBD 6.1 in verifying the tenderer's status. The following must be submitted as proof of claim as declared on SBD 6.1 for the specific goals: • Company Registration Certification as issued by the Companies and Intellectual Property Commission (CIPC). • Sworn Affidavit or valid B-BBEE Certificate or Consolidated B-BBEE certificate for Consortium, Joint Venture, or Trust.

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

SBD 3.3

PRICING SCHEDULE
(Professional Services)

NAME OF BIDDER: ……**BID NO: DHA20-2026**

CLOSING TIME 11:00 **CLOSING DATE: 27 NOVEMBER 2026**

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

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

1. The accompanying information must be used for the formulation of proposals.

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

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

4. Estimated man-days for completion of project ……..…….

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

SBD4

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

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

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

2. Bidder's declaration

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

employed by the state? **YES/NO**

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

Full Name	**Identity Number**	**Name of State institution**

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

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

2.2.1 If so, furnish particulars:

……

……

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

2.3.1 If so, furnish particulars:

……..

……..

3 DECLARATION

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

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

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

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

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

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

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

3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and

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

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

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.
I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

…… ……

Signature Date

…… ……

Position Name of bidder

SBD 6.1

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

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

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

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1. GENERAL CONDITIONS

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

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

1.2 To be completed by the organ of state

a) The applicable preference point system for this tender is the 80/20 preference point system.

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

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

a) Price; and

b) Specific Goals.

1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

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

1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points

for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

(a) **"tender"** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;

(b) **"price"** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;

(c) **"rand value"** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

(d) **"tender for income-generating contracts"** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and

(e) **"the Act"** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. **POINTS AWARDED FOR PRICE**

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

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

80/20 **or** **90/10**

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

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

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

3.2.1. **POINTS AWARDED FOR PRICE**

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

80/20 **or** **90/10**

$$Ps = 80\left(1 + \frac{Pt - P\,max}{P\,max}\right) \text{ or } \quad Ps = 90\left(1 + \frac{Pt - P\,max}{Pmax}\right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmax = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

4.1 In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:

4.2 In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—

(a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or

(b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,

then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

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

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

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

The specific goals allocated points in terms of this tender	Number of points Allocated (80/20 system) (To be completed by the organ of state)	Evidence	Number of points claimed (80/20 system) (To be completed by the tenderer)
The company owned / director/s / shareholders by people who are Women. • 100% company owned by people who are Women **= 10 points** • ≥51% and <100% company owned by people who are Women = **7 points** • >0% and <51% company owned by people who are Women = **2 points** • 0% company owned by people who are Women = **0 points**	10	proof of claim as declared on SBD 6.1 in verifying the tenderer's status The following must be submitted as proof of claim as declared on SBD 6.1 for the specific goals: • Company Registration Certification as issued by the Companies and Intellectual Property Commission (CIPC). • Sworn Affidavit or valid B-BBEE Certificate or Consolidated B-BBEE certificate for Consortium, Joint Venture, or Trust.	
The company owned / director/s / shareholders by people who are Black. • 100% company owned by people who are Black = **7 points** • ≥51% and <100% company owned by people who are Black = **5 points** • >0% and <51% company owned by people who are Black = **2 points**	7	Proof of claim as declared on SBD 6.1 in verifying the tenderer's status The following must be submitted as proof of claim as declared on SBD 6.1 for the specific goals: • Company Registration Certification as issued by the Companies and Intellectual Property Commission (CIPC).	

The specific goals allocated points in terms of this tender	Number of points Allocated (80/20 system) (To be completed by the organ of state)	Evidence	Number of points claimed (80/20 system) (To be completed by the tenderer)
• 0% company owned by people who are Black = **0 points**		• Sworn Affidavit or valid B-BBEE Certificate or Consolidated B-BBEE certificate for Consortium, Joint Venture, or Trust.	
The company owned / director/s / shareholders by people who are Disabled. • 100% company owned by people who are Disabled = **3 points** • ≥51% and <100% company owned by people who are Disabled = **2 points** • >0% and <51% company owned by people who are Disabled = **1 point** • 0% company owned by people who are Disabled = **0 points**	3	proof of claim as declared on SBD 6.1 in verifying the tenderer's status The following must be submitted as proof of claim as declared on SBD 6.1 for the specific goals: • Company Registration Certification as issued by the Companies and Intellectual Property Commission (CIPC). • Sworn Affidavit or valid B-BBEE Certificate or Consolidated B-BBEE certificate for Consortium, Joint Venture, or Trust.	

DECLARATION WITH REGARD TO COMPANY/FIRM

4.3 Name of company/firm……

4.4 Company registration number: ……...

4.5 TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One-person business/sole propriety
- ☐ Close corporation
- ☐ Public Company
- ☐ Personal Liability Company

- ☐ (Pty) Limited
- ☐ Non-Profit Company
- ☐ State Owned Company

[TICK APPLICABLE BOX]

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

i) The information furnished is true and correct;

ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;

iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;

iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –

(a) disqualify the person from the tendering process;

(b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;

(c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;

(d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and

(e) forward the matter for criminal prosecution, if deemed necessary.

……

SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME: ……

DATE: ……

ADDRESS: ……

……

……