

PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)					
BID NUMBER:	Sesiu/NLU/002/2025	CLOSING DATE:	14 FEBRUARY 2025	CLOSING TIME:	16H00
DESCRIPTION	Appointment of External Auditors for PanSALB on behalf of Sesiu National Lexicography Unit (NLU).				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
Electronic submissions: quotations@pansalb.org					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Ms Mapula Molepo		CONTACT PERSON	MS SHOCKY MASHIGO	
TELEPHONE NUMBER	012 341 9651		TELEPHONE NUMBER	012 341 9651	
FACSIMILE NUMBER			FACSIMILE NUMBER		
E-MAIL ADDRESS	mapula@pansalb.org		E-MAIL ADDRESS	shocky@pansalb.org	
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 DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. 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, 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:

.....

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RFQ/TENDER/BID No.:	Sesiu/NLU/002/2025
DESCRIPTION:	Appointment of External Auditors for PanSALB on behalf of Sesiu National Lexicography Unit (NLU).
ADVERT DATE:	28 JANUARY 2025
MANDATORY BRIEFING SESSION:	Date: 07 FEBRUARY 2025 Time: 11:00am (Applicants to e-mail mapula@pansalb.org (not for tender submissions) - please write Sesiu/NLU/002/2024 BRIEFING SESSION LINK on the subject line to request for the link). This will be via Microsoft Teams Microsoft Teams Need help? Join the meeting now Meeting ID: 346 345 068 77 Passcode: ui29R4SW
CLOSING TIME AND DATE	14 FEBRUARY 2025 @16H00
DELIVERY DETAILS:	<u>Electronic submissions: quotations@pansalb.org</u> <i>Please note that our servers will block any file greater than 200MB. If your file is greater than 200MB, please divide your submission into parts that are equal or less than 200MB and state on the subject 'Part 1, Part2 or Part 3'.</i> E.G. Sesiu/NLU/002/2024 – PART 1 (on the subject line)
REQUIRED RFQ/ TENDER VALIDITY:	120 days after closing date
CONTACT PERSON:	Mapula Molepo (mapula@pansalb.org – not for tender submissions) and state <u>Sesiu/NLU/002/2024</u> on the subject line for enquiries about the rfq/tender
DURATION OF CONTRACT	3 years (commencing 2024/2025 Financial Year)

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1. BACKGROUND

- 1.1. Section 6(1) of the Constitution of the Republic of South Africa provides for the official languages (Sepedi, Sesotho, Setswana, Siswati, Xitsonga, Afrikaans, English, isiNdebele, Tshivenda, isiXhosa and isiZulu).
- 1.2. Based on Section 6(5) of the same Constitution, PanSALB was established through the PanSALB Act (Act 95 of 1995) as amended to promote the Khoi, Nama, and San Languages, commonly known among speakers of these languages as Khoe and San languages, and Sign Language (named South African Sign Language by the users to distinguish the language from other Sign Languages of the world).
- 1.3. In addition to this, PanSALB has to promote and ensure respect for all languages commonly used by communities in South Africa. The above illustrates that the promotion of multilingualism is the core of the PanSALB mandate.
- 1.4. The introduction of the National Development Plan (NDP) brought with it the concept of national cohesion, which in terms of languages is driven by multilingualism and can be realized when South Africans become visibly multilingual.

2. PURPOSE

- 2.1. PanSALB seeks to appoint a reputable and suitably experienced audit firm, to perform the annual statutory audit for the 3 financial years (starting with the 2024/2025 Financial year). The external audit services provided will be performed on behalf of the Auditor General of South Africa (AGSA) in terms of the Public Audit Act of 2005 (PAA), therefore, the appointed service provider will be required to liaise with the AGSA team during the audit.

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3. ELIGIBILITY CONDITIONS

- 3.1. The tenure of PanSALB's current external auditors has come to an end with the audit of the 2023/24 financial year. Auditors are rotated in terms of the Auditing Profession Act, 26 of 2005. Therefore, audit firms that have audited PanSALB SeSiu sa Sesotho National Lexicography Unit (NLU) for the preceding 3 years (1 April 2019 to 31 March 2024) are not eligible to bid.
- 3.2. Should the bidder currently perform other non-audit functions for the organization, this should be highlighted in the bid document with a clear articulation as to why the bidder's independence (actual or perceived) is not impaired.
- 3.3. PanSALB seeks to appoint a firm that has experience in conducting external audits to provide the users of PanSALB's audited financial statements with reasonable assurance of the quality of work performed.

4. SCOPE OF WORK

- 4.1. The appointed audit firm will be required to perform all statutory audit work for PanSALB, SeSiu National Lexicography Unit, as well as closely related non-audit services as outlined below in line with the requirements of the Auditor General and the Public Auditors Act (PAA):
 - 4.1.1. Perform the year end audit of the NLU;
 - 4.1.2. Express an opinion on the consolidated and separate financial statements of the group;
 - 4.1.3. Express an opinion on the non-financial performance indicators (as may be required) by the AGSA;
 - 4.1.4. Perform a review and express an opinion on the National Treasury financial statements template, based on the statutory audit work performed;
 - 4.1.5. Perform any additional audit work as may be required by the AGSA or other relevant stakeholder.

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4.2. Required outputs would include (but will not be limited to) the following:

- 4.2.1. Providing SeSiu National Lexicography Unit with an audit planning memorandum before the commencement of the audit each year. This memorandum should detail the audit plan, risk areas, and the impact this has on the standard audit program. A fee for the year must also be proposed based on the plan, with a detailed schedule of the fee being made available for approval by the Audit and Risk Committee;
- 4.2.2. In collaboration with the entity's internal audit function, refine the combined assurance model and ensure appropriate and relevant execution thereon;
- 4.2.3. An interim audit is to be performed in the last quarter of the financial year, a management letter should form part of this interim audit;
- 4.2.4. Statutory Audit of the final annual financial statements of the consolidated and separate annual financial statements for conclusion by 31 May of each year (the entity strives to ensure the completion of the audit is done by 31 May including the sign off).
- 4.2.5. Submitting a report to PanSALB as the principal entity and the Audit and Risk Committee in May each year, detailing the audit opinion and any other matters to be brought to the attention of the Audit and Risk Committee;
- 4.2.6. Providing a report on the review of the National Treasury financial statements template for the economic entity, to be submitted to National Treasury by 31 May of each year;
- 4.2.7. Providing NLU with an assessment, based on audit procedures performed, on the adequacy of internal control systems and processes via a management report letter detailing concerns that require NLU's attention with recommendations after allowing for discussion with NLU management to determine the relevance of insights raised;
- 4.2.8. To collaborate with the Internal Audit function to determine the extent of evidence and reports obtained from the Internal Audit function to assist them in their external audit work, to inform their understanding of the organisation and its control environment, as well as help to identify and assess key risk areas;
- 4.2.9. Providing technical assistance and guidance on request; and

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4.2.10. Strict and mandatory adherence to the statutory deadlines (Public Finance Management Act (PFMA) and other deadlines). These deadlines might be shortened by NLU management, the audit firm is expected to adapt accordingly. NLU works towards finalizing the Management Report and signed annual financial statements by 30 April of each year.

5. MANDATORY REQUIREMENTS

- 5.1. Proposals will be disqualified or excluded under the following conditions:
 - 5.1.1. Proposals submitted after the deadline;
 - 5.1.2. Proposals submitted to the incorrect email address;
 - 5.1.3. Service Providers not registered on the Central Supplier Database (www.csd.gov.za);
 - 5.1.4. Service Providers whose tax matters are not in order by the time that PanSALB intends to appoint the preferred service provider;
 - 5.1.5. Not attending the online mandatory briefing session.
 - 5.1.6. Not including a certificate from the Independent Regulatory Board for Auditors (IRBA) indicating the certification of the firm.
 - 5.1.7. Service Providers have provided any services to the NLU during the past years ending 31 March 2024 to ensure independence (List previous work done for NLU and indicate why the firm believes that the project will not impair its independence towards NLU, should the bid be successful).
 - 5.1.8. Not including proof or confirmation of membership and good standing of both the Engagement Partner and the Manager with the South African Institute of Chartered Accountants (SAICA).
 - 5.1.9. Audit firm with less than two years of audit experience within the public sector.
 - 5.1.10. Proposal that does not include an independent quality control process within the audit methodology and plan.

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6. FUNCTIONAL REQUIREMENTS

6.1. The proposals should contain the following:

- 6.1.1. Provide dedicated resources available for the external audit for the first year of the engagement, qualifications, and experience of such resources (attach CVs including proof of memberships);
- 6.1.2. Provide CVs of the proposed lead partner, audit partner, and manager clearly indicating the individuals' designation, qualifications, client experience in the public sector, independence declarations, and relevant letters of good standing
- 6.1.3. Availability, experience, and academic qualification levels of staff to be committed to the audit throughout the 3-years period showing the number of staff and their academic levels. Please populate the information needed in the following format:

Designation	Name and Surname	Academic level – required	Team member current academic level	Number of years' experience within the public sector
First year trainee		B Com Accounting		
First year trainee		B Com Accounting		
Second year trainee		CTA		
Second year trainee		CTA		

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Third year trainee		Passed Part 1 of Board exam		
Supervisor		Newly qualified CA(SA)		
Manager		CA(SA)		
Engagement partner		CA(SA)		

- 6.1.5. Knowledge of and exposure to the PFMA, Treasury Regulations and Generally Recognized Account Practice (GRAP) are essential;
- 6.1.6. Independence and objectivity must be assured by there not being any conflict of interest;
- 6.1.7. List previous work done for PanSALB or NLU (if any) and indicate why the firm believes that the project will not impair its independence towards PanSALB or NLU, should the bid be successful;
- 6.1.8. Track record and reputation – 5 written references attesting to performing statutory audits in the public sector are required. The reputation of the firm must demonstrate professional competence and integrity as confirmed by the clients.
- 6.1.9. Confirmation of the existence of a technical department, as well as numbers and levels of staff in this department.
- 6.1.10. Confirmation of the existence of an independent control function with the audit methodology.
- 6.1.11. The audit firm is to preferably have a minimum of five (5) years' experience in conducting audits for government entities.

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7. GENERAL TERMS AND CONDITIONS

- 7.1. The Respondent is responsible for all costs incurred in the preparation and submission of the proposal.
- 7.2. A copy/s of any affiliations, memberships, and/or accreditations that support your submission must be included in the proposal.
- 7.3. Any appointments/awards by the Agency will be subject to confirmation and acceptance by the AGSA. Further annual re-appointments will be subject to acceptable performance, and approval by the PanSALB Audit and Risk Committee (ARC).
- 7.4. Kindly note that PanSALB is entitled to:
 - 7.4.1. Amend any RFQ conditions, validity period, specifications, or extend the closing date and/or time of RFQs before the closing date. All Respondents, to whom the RFQ documents have been issued, will be advised in writing of such amendments in good time;
 - 7.4.2. Verify any information contained in a proposal;
 - 7.4.3. Not appoint any bidder;
 - 7.4.4. Vary, alter, and/or amend the terms of this RFQ, at any time prior to the finalization of its adjudication hereof;
 - 7.4.5. Disqualify proposals that contain an omission of disclosure of material information, that is factually inaccurate, and/or contains a misrepresentation of facts. This could also lead to the cancellation of any subsequent contracts;
 - 7.4.6. Not accept the lowest priced proposal or any proposal in part or in whole. PanSALB normally awards the contract to the Bidder who proves to be fully capable of handling the contract and whose proposal is technically acceptable and/or financially advantageous to PanSALB. Appointment as a successful contractor shall be subject to the parties agreeing to mutually acceptable contractual terms and conditions. In the event of the parties failing to reach such agreement within 30 (thirty) days from the appointment date, PanSALB shall be entitled to appoint the contractor who was rated 2nd (second), and so on;

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- 7.4.7. Award this RFQ as a whole or in part without furnishing reasons;
- 7.4.8. Cancel or withdraw from this RFQ as a whole or in part without furnishing reasons and without attracting any liability;
- 7.4.9. The Bidder hereby offers to render all the services described in the attached documents (if any) to NLU on the terms and conditions and in accordance with the specifications stipulated in this RFQ documents (and which shall be taken as part of, and incorporated into, this proposal at the prices inserted therein);
- 7.4.10. This proposal and its acceptance shall be subject to the terms and conditions contained in this RFQ document;

8. EVALUATION CRITERIA

- 8.1. The RFQ will be evaluated based on the bidder's response fit with the criteria requirements listed below. Bidders are advised to clearly respond to each of the evaluation criteria in their proposals, providing substantiating evidence of such according to each criteria's requirements.

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EVALUATION CRITERIA	WEIGHT	MAXIMUM SCORE
1. Audit firm's audit experience in the public sector – indicating the total number of years. Firms must provide a schedule of the public-sector audit performed with relevant proof of the audit completed e.g. AGSA confirmations, audit confirmations, etc. 5 = More than 10 years public-sector experience; 4 = More than 5 years less than 10 years public-sector experience, 3 = >4 to 5 years' of public-sector experience, 2 = >3 to 4 years' public-sector experience, 1 = 2 to 3 years' public-sector experience; and 0 = less than 2 years' public-sector experience.	5	25
2. Lead Partner/Engagement Partner - Experience in leading a team of auditors in terms of external audits of public sector entities, this should be verified in terms of a CV supplied (as per point 6.1.3). 5 = More than 10 years experience; 4 = 10 years experience; 3 = more than 5 years but less than 10 years; 2 = more than 1 year and less than 5 years; 1 = less than 1 year's experience; and 0 = no CV included	5	25

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EVALUATION CRITERIA	WEIGHT	MAXIMUM SCORE
3. Five (5) written reference letters from previous public sector clients where external audit services were performed in the past 5 years. The reference letters should confirm the services provided, and attest to the professionalism and integrity of the firm as well as the level of satisfaction. The reference should be on the audited organization's letterhead and signed by the audited organization's CFO. 5 = 5 completed references, all with the positive feedback 4 = 4 completed references, all with the positive feedback 3 = 3 completed references, all with the positive feedback 2 = 2 completed references, all with the positive feedback 1 = 1 completed reference, all with the positive feedback 0 = 0 completed references, all with the positive feedback	5	25

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EVALUATION CRITERIA	WEIGHT	MAXIMUM SCORE
4. Audit Manager – The audit manager should have a Chartered Accountant (CA/SA) qualification as a minimum and have the following years of experience in managing external audit-related projects in public sector. Only experience within the public sector will be considered. Please include CVs clearly indicating the number of years or part thereof of public sector experience. 5 = More than 5 years' experience and Chartered Accountant (CA/SA) qualification 4 = 3-5 years' experience and Chartered Accountant (CA/SA) qualification 3 = 2-3 years' experience and Chartered Accountant (CA/SA) qualification 2 = 1-2 years' experience and Chartered Accountant (CA/SA) qualification 1 = Less than 1-year experience and Chartered Accountant (CA/SA) qualification 0 = Not clearly specified.	5	25

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5. Supervisor/Assistant Audit Manager – The Supervisor/ Assistant audit manager should have at least a Postgraduate Diploma in accounting sciences (CTA) or higher qualification and have the following years of experience in managing external audit-related projects in public sector. Only experience within the public sector will be considered. Please include CVs clearly indicating the number of years or part thereof of public sector experience. 5 = More than 5 years' experience and at least a Post-graduate Diploma in accounting sciences (CTA) or higher qualification 4 = 3-5 years' experience and at least a Post-graduate Diploma in accounting sciences (CTA) or higher qualification 3 = 2-3 years' experience and at least a Post-graduate Diploma in accounting sciences (CTA) or higher qualification 2 = 1-2 years' experience and at least a Post-graduate Diploma in accounting sciences (CTA) or higher qualification 1 = Less than 1-year experience and at least a Post- graduate Diploma in accounting sciences (CTA) or higher qualification 0 = Not clearly specified.	5	25



EVALUATION CRITERIA	WEIGHT	MAXIMUM SCORE
6. Trainees/Article clerks – The trainees/Articles clerks should be studying towards a Post-graduate Diploma in accounting sciences (CTA) or higher with a minimum of B. Comm in Accounting already obtained and have the following years of experience in managing external audit- related projects. Only experience within the public sector will be considered. Please include CVs clearly indicating the number of years or part-thereof of public sector experience. 5 = More than 4 years’ experience and should be studying towards a Post-graduate Diploma in accounting sciences (CTA) or higher with a minimum of B. Comm in Accounting already obtained 4 = 3-4 years’ experience and should be studying towards a Post-graduate Diploma in accounting sciences (CTA) or higher with a minimum of B. Comm in Accounting already obtained 3 = 2-3 years’ experience and should be studying towards a Post-graduate Diploma in accounting sciences (CTA) or higher with a minimum of B. Comm in Accounting already obtained 2 = 1-2 years’ experience and should be studying towards a Post-graduate Diploma in accounting sciences (CTA) or higher with a minimum of B. Comm in Accounting already obtained 1 = Less than 1-year experience and should be studying towards a Post-graduate Diploma in accounting sciences (CTA) or higher with a minimum of B. Comm in Accounting	5	25



already obtained 0 = Not clearly specified.		
7. Functional Evaluation: Project Audit Plan and Methodology – Project / Audit plan and audit methodologies in line with the task description outlined under project scope/task description, with clear milestones and timeframes for each task to be completed. Audit methodology should be properly outlined (please refer to the scope of work) including appropriate methodology for the use of internal audit work through a combined assurance approach and ensuring appropriate independent quality reviews. 5 = Project/Audit plan well broken down with methodology, deliverables, timeframe/milestone, quality assurance & management of the project including staff deployment to each activity/ deliverable. A sample/example of a detailed audit report and audit strategy. The treatment and correlation between risk assessment and audit approach to be outlined. 4 = Project/Audit plan well broken down with methodology, deliverables, timeframe/milestone, quality assurance & management of the project including staff deployment to each activity/ deliverable. A sample/example of a detailed audit report and audit strategy. 3 = Project/Audit plan provided with audit methodology, deliverables, timeframe/milestone & management of the project. A sample/example of detailed audit report and audit strategy. 2 = Project/Audit plan provided with clear deliverables, audit	5	25



methodology & timeframes/milestones. 1 = Project/Audit plan provided with no clear deliverables, audit methodology & timeframes/ milestones. 0 = No project/audit plan and audit methodology.		
Total weighted score/Maximum possible score	30	150
Minimum qualifying score (expressed as a percentage)		70%

SPECIFIC GOALS

Specific Goal	Points	Proof
At least 51% of blackownership.	10	Share register
Less than 51% of blackownership.	0	
At least 50% of the project team comprises of black and/or women professionals.	5	ID documents
Less than 50% of the project team comprises of black and / or women professionals.	0	
At least 1 position in the project team is given to a young professional (that is under 35 years old).	5	ID documents
No young professionals that is under 35.	0	
Total points for specificgoals	20	
Price	80	Quotation
Total	100	

9. DEADLINE FOR SUBMISSION

- 9.1.** All proposals must be e-mailed to: quotations@pansalb.org no later than **14 FEBRUARY 2025 @16H00**

10. COSTING

- 10.1. Pricing to be included in the RFQ amount as per the table below should only be for the first year of the audit, as this RFQ amount will be used for the evaluation.
- 10.2. Price escalation for the subsequent 2 years of the audit will be based on a negotiation process with PanSALB where factors such as cost escalation, change in audit scope, improved client efficiencies, improved audit efficiencies, and changes in the environment will be considered. The fee for all years will be subject to approval by the Management or Audit and Risk Committee of PanSALB, who will not unreasonably withhold such approval where plausible reasons for escalation have been aptly communicated and agreed upon with NLU management.
- 10.3. PanSALB will not pay more than the AGSA / SAICA guided rates applicable to the public sector.
- 10.4. Disbursements shall be billed to PanSALB the maximum of the SARS re-embursive rates. This shall ensure that all relevant efforts are in place to ensure maintenance of costs taking into account cost containment measures as prescribed by national treasury. Disbursements shall be paid based on actual costs incurred.

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Please note:

Financial Evaluation Criteria		Unit of Measure	Quantity	Rate (Incl. Vat)	Total cost (Incl. Vat)
All Sections – Statutory audit					
Required personnel	Partner	Hours			
	Manager	Hours			
	Supervisor	Hours			
	3 rd year trainee	Hours			
	2 nd year trainee	Hours			
	2 nd year trainee	Hours			
	1 st year trainee	Hours			
	1 st year trainee	Hours			
Total statutory audit					
	NT AFS	Total fee			
Total Audit costs					
Disbursements					
Total bid amount					



11. PERIOD OF APPOINTMENT

11.1. Although the RFQ will be awarded to the successful bidder for a period of 3 years, the annual appointment of such an audit firm is dependent upon:

11.1.1. AGSA not exercising its right to audit NLU as a public entity under the PAA;

11.1.2. Annual confirmation from AGSA that the firm may be appointed for another year; and

11.1.3. Formal approval of the audit planning memorandum at the Audit and Risk Committee of the entity.

PRICING TEMPLATE

PANSALB WILL NOT PAY MORE THAN THE AGSA / SAICA GUIDED RATES APPLICABLE TO THE PUBLIC SECTOR.

Financial Evaluation Criteria		Unit of Measure	Quantity	Rate (Incl. Vat)	Total cost (Incl. Vat)
All Sections – Statutory audit					
Required personnel	Partner	Hours			
	Manager	Hours			
	Supervisor	Hours			
	3 rd year trainee	Hours			
	2 nd year trainee	Hours			
	1 st year trainee	Hours			
Total statutory audit					
	NT AFS	Total fee			
Total Audit costs					
Disbursements					
Total bid amount					

SBD 4

BIDDERS 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.

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.

Full Name	Identity Number	Name of State institution

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 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 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.

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.

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

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

(delete whichever is not applicable for this tender).

- a) The applicable preference point system for this tender is the 90/10 preference point system.
- b) The applicable preference point system for this tender is the 80/20 preference point system.
- c) Either the 90/10 or 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:

$$\begin{array}{ccc} \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\ \mathbf{Ps} = \mathbf{80} \left(1 - \frac{Pt - P_{min}}{P_{min}} \right) & \mathbf{or} & \mathbf{Ps} = \mathbf{90} \left(1 - \frac{Pt - P_{min}}{P_{min}} \right) \end{array}$$

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:

$$\begin{array}{ccc} \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\ \mathbf{Ps} = \mathbf{80} \left(1 + \frac{Pt - P_{max}}{P_{max}} \right) & \mathbf{or} & \mathbf{Ps} = \mathbf{90} \left(1 + \frac{Pt - P_{max}}{P_{max}} \right) \end{array}$$

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.

(Note to organs of state: Where either the 90/10 or 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 (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Woman	N/A	5	N/A	
Promotion of SMME's	N/A	10	N/A	
Youth	N/A	3	N/A	
PWD (Disability)	N/A	1	N/A	
Locality	N/A	1	N/A	

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:

.....

.....