PART A
INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE LIMPOPO PROVINCIAL TREASURY					
BID NUMBER:	LPT 003/2026	CLOSING DATE:	28 AUGUST 2026	CLOSING TIME:	11H00
DESCRIPTION	ESTABLISHEMENT OF A PANEL TO PROVIDE LONG TERM PUBLIC SECTOR FINANCIAL MANAGEMENT CAPACITY BUILDING PROGRAMMES FOR A PERIOD OF THREE YEARS (36 MONTHS)				

BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT *(STREET ADDRESS)*
ISMINI TOWERS TENDER BOX
LIMPOPO PROVINCIAL TREASURY
46 HANS VAN RENSBURG STREET
POLOKWANE

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO		TECHNICAL ENQUIRIES MAY BE DIRECTED TO:	
CONTACT PERSON	NGOASHENG N. A	CONTACT PERSON	TAYOB H
TELEPHONE NUMBER	015 298 7056	TELEPHONE NUMBER	082 904 6758
FACSIMILE NUMBER	015 298 7056	FACSIMILE NUMBER	
E-MAIL ADDRESS	Ngoashengna@treasury.limpopo.gov.za	E-MAIL ADDRESS	TayobH@treasury.limpopo.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 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: ……………………………………………

000001

SBD 3.1

PRICING SCHEDULE – FIRM PRICES (PURCHASES)

NOTE: **ONLY FIRM PRICES WILL BE ACCEPTED. NON-FIRM PRICES (INCLUDING PRICES SUBJECT TO RATES OF EXCHANGE VARIATIONS) WILL NOT BE CONSIDERED**

IN CASES WHERE DIFFERENT DELIVERY POINTS INFLUENCE THE PRICING, A SEPARATE PRICING SCHEDULE MUST BE SUBMITTED FOR EACH DELIVERY POINT

Name of bidder……………………………	Bid number: LPT 003/2026
Closing Time **11:00**	Closing date: 28/08/2026

OFFER TO BE VALID FOR **120** DAYS FROM THE CLOSING DATE OF BID.

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

- Required by: …………………………………
- At: …………………………………

  …………………………………

- Brand and model …………………………………
- Country of origin …………………………………
- Does the offer comply with the specification(s)? *YES/NO
- If not to specification, indicate deviation(s) …………………………………
- Period required for delivery …………………………………

  *Delivery: Firm/not firm

- Delivery basis …………………………………

Note: All delivery costs must be included in the bid price, for delivery at the prescribed destination.

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

*Delete if not applicable

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**

2.2 Do you, or any person connected with the bidder, have a relationship

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.

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

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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.

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.

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

…………………………………	………………………………………………
Signature	Date
…………………………………	………………………………………………
Position	Name of bidder

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

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

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

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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**

(*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**

000006

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**

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

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**

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

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.

(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)
Black people ownership ≥51%	N/A	**7**	N/A	
Woman ownership ≥ 51%	N/A	**6**	N/A	
Persons with disabilities ownership ≥ 51%	N/A	**2**	N/A	
Youth ownership ≥ 51%	N/A	3	N/A	
Locality – business / company based within a specific region (Limpopo) i.e. Municipal account/ address confirmation from Local Authority)	N/A	**2**	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: ……………………………………………………………

……………………………………………………………

……………………………………………………………

……………………………………………………………

LIMPOPO
PROVINCIAL GOVERNMENT
REPUBLIC OF SOUTH AFRICA

PROVINCIAL TREASURY

TERMS OF REFERENCE

ESTABLISHMENT OF A PANEL OF SERVICE PROVIDERS TO PROVIDE LONG- TERM PUBLIC SECTOR FINANCIAL MANAGEMENT CAPACITY BUILDING PROGRAMMES FOR A PERIOD OF THREE YEARS (36 MONTHS)

2026/27-2029/30

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Ismini Towers,46 Hans Van Rensburg Street,Polokwane 0700 Private Bag X9486,Polokwane 0700
Tel: 015 298 7000 Website :http//www.limtreasury.gov.za

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LIST OF ACRONYMS

CIGFARO	Chartered Institute of Government Finance Audit and Risk Officers
CIPC	Companies & Intellectual Property Commission
CSD	Central Supplier Database
FMCB	Financial Management Capacity Building
LDP	Limpopo Development Plan
LPT	Limpopo Provincial Treasury
MOV	Means of Verification
NDP	National Development Plan
NQF	National Qualifications Framework
PFMA	Public Finance Management Act, Act 1 of 1999 as amended.
PPPFA	Preferential Procurement Policy Framework Act
SAICA	South African Institute of Chartered Accountants
SAIPA	South African Institute of Professional Accountants
SAQA	South African Qualifications Authority
SARS	South African Revenue Service
SETA	Sector Education and Training Authority
TORs	Terms of Reference

1. INTRODUCTION

1.1 The Public Finance Management Act, 1 of 1999 (As amended by Act 29 of 1999), Chapter 3, S(18)(2)(e) mandates that a Provincial Treasury may assist provincial departments and public entities in building their capacity for efficient, effective, and transparent financial management.

1.2 The Financial Management Capacity Directorate sets targets of long-term accredited courses in line with the National Qualifications Framework (NQF) which gives effect to the South African Qualifications Authority (SAQA).

1.3 LPT intends to carry out a procurement exercise to solicit proposals from Tertiary Institutions, Professional Bodies and Accredited Training Service Providers within the Republic of South Africa to provide their services through a dedicated team of qualified facilitators and any other expertise that will be required, based on the specific nature of the training to be provided at that point in time.

2. PURPOSE OF THIS REQUEST FOR BID (RFB)

2.1 The purpose of the RFB is to form a panel of accredited and credible service providers for the purpose of providing long-term training/capacity building programmes in one or more of the following public sector disciplines:

i. Asset Management
ii. Management Accounting
iii. Financial Accounting
iv. Internal Control
v. Supply Chain Management
vi. Risk Management
vii. Internal Audit
viii. Governance and Compliance
ix. Contract Management
x. Project Management

2.2 Work allocation under the panel will be conducted through a fair, transparent, and well-documented process. This process will take into account the nature of the required training, the relevant area of accreditation, availability, pricing (where applicable), past performance, and the capacity of each panel member.

Notwithstanding the existence of this contract, the Department reserves the right to procure goods or services outside the contract in line with applicable National Treasury prescripts, including the Public Finance Management Act (PFMA) and Treasury Regulations governing Supply Chain Management, where such procurement is justified and duly approved.

2.3 The team will among others perform the following activities:

a) Provide accredited in-house public sector relevant qualification programmes in block releases.
b) The successful institution(s) will be expected to deliver the long-term public sector financial management training courses ranging from a minimum of 12 months to a maximum of 36 months, to Limpopo Provincial Departments and Public Entities.
c) Assessment of learners using appropriate assessment methodologies; and
d) Issue appropriate NQF level certificates in line with South African Qualifications Authority (SAQA).

3. LEGISLATIVE FRAMEWORK OF THE BID

3.1 Tax Legislation and CSD compliance

a) Bidder(s) must be tax compliant at the time of submitting a bit to LPT and must, if appointed, remain tax compliant for the entire contract term with all applicable tax legislation, including but not limited to the Income Tax Act, 1962 (Act No. 58 of 1962) and Value Added Tax Act, 1991 (Act No. 89 of 1991).
b) Bidder(s) are required to be registered on the CSD and LPT will verify the bidder(s) tax compliance status through the CSD.

c) Where Joint Ventures and/or Consortium are involved, each party must be registered on the CSD and their tax compliance status will be verified through the CSD.

3.2 Procurement Legislation

LPT has a detailed evaluation methodology based on Treasury Regulation 16A3 promulgated under Section 76 of the Public Finance Management Act, 1999 (Act No. 1 of 1999), the Preferential Procurement Policy Framework Act 2000 (Act No.5 of 2000), PPPFA Regulations of 2022, Provincial SCM Policy and Provincial Standard Operating Procedure, Annexure A of National Treasury Instruction No. 1 of 2024/2025, National Travel Policy Framework (Instruction no. 02. of 2017/18) and Departmental Preferential Procurement Policy of 2023.

3.3 Technical Legislation and/or Standards

Bidder(s) should be cognisant of the legislations, standards or any other frameworks specifically applicable to Financial Management Training.

4. CODE OF PROFESSIONAL ETHICS

The Tertiary Institutions, Professional Bodies and Accredited Training Service Providers are expected to apply and uphold the following guiding principles:

4.1 Professionalism and diligence

An institution shall, always demonstrate commitment to professionalism and diligence in the performance of its duties; maintain professional knowledge and skills at the level required to ensure that a client or employing organization receives competent professional services and act diligently and in accordance with applicable technical and professional standards.

4.2 Integrity

An institution shall, always, exhibit the highest level of integrity and honesty in the performance of all professional assignments.

4.3 Objectivity

To exercise professional or business judgment without being compromised by biasness; Conflict of interest; or Undue influence of, or undue reliance on, individuals, organisations, technology, or other factors.

4.4. Confidentiality

An institution shall always treat information with high level of confidentiality. Personal information, including results of learners should not be shared with anyone.

5. SCOPE OF WORK

Providing long-term public sector financial management qualification programmes

a) The assignment will be structured around phases based on consultation and agreement with the LPT Project Management Team, which will be responsible for co-ordination of each assignment.
b) The Project Management Team will be controlled and directed by the Director: Financial Management Capacity Building within the Office of the Provincial Accountant-General and this will be the institution`s main point of contact in the LPT.

6. QUALIFICATIONS AND EXPERIENCE REQUIRED

6.1 Mandatory requirements

The qualifications and experience required from the bidders will depend on the type, scope and nature of the assignment ordered by LPT. The Tertiary Institutions, Professional Bodies and Accredited Training Service Providers must have the following minimum expertise and capacity requirements:

a) Have the necessary skill, knowledge, capacity, and resources to meet the needs of the LPT and to carry out the assignment.

b) Have knowledge and comprehensive understanding of the public sector finance areas and demonstrate an understanding of the public sector finance legislations and related regulations, particularly those pertaining to the disciplines listed in paragraph 2.1.

c) Must be registered with the relevant Sector Education and Training Authority (SETA) or Or Council for Higher Education (CHE) as an accredited service provider in line with the National Qualifications Framework Act 67 of 2008 as required by the Skills Development Act, 97 of 1998.

d) The modules/units' standards must be aligned to the National Qualifications Framework (NQF) level.

e) The service provider must provide competency assessment methodologies (Written assessment/ exams).

7. EVALUATION PROCESS AND CRITERIA

7.1 Quality Evaluation

7.1.1 Bids will be evaluated in accordance with the prescripts of the Preferential Procurement Regulations of 2022, Departmental Preferential Procurement Policy of 2023 and Provincial Treasury Supply Chain Management policies.

7.1.2 General Conditions of Contract can be found on the Provincial/National Treasury Website.

7.1.3 LPT has set minimum criteria that a bidder(s) needs to meet in order to be evaluated and selected as a successful bidder(s).

7.1.4 Evaluation of bids will be conducted in two (02) phases as follows:

a) <u>Phase 1 – Administrative Requirements</u>

Bidders will be evaluated according to administrative requirements which include the submission of mandatory information or documentation. Bidders who fail to meet the administrative requirements of the bid will not be considered further for evaluation on functionality requirements i.e. Phase 2.

Failure to comply with the following conditions will invalidate your offer.

- Bidder(s) are urged to read and understand the contents of SBD 4 form. Bidder(s) must ensure the full completion and signing of SBD 4 and give special attention to section 2.3, failure to disclose ALL the companies under the directors on CSD will lead to **disqualification.**
- Only bid documents issued by LPT for this bid will be accepted.
- Any bidder(s) representative (Director/Shareholder/Proposed Resource) who is employed by the state will not be considered and will lead to **disqualification.**
- Failure to attach accreditation letter/ certificates with SETA will result in **disqualification** and will not be evaluated further.

b) Phase 2 – Functionality (Technical Desktop Evaluation)

The minimum qualifying score for functionality is 70%. All bids that fail to achieve the minimum qualifying score on functionality shall not be considered for inclusion into the panel.

7.2 Evaluation criteria

The bid will be evaluated on functionality as per Table 1:

Table 1: Technical Desktop Evaluation

EVALUATION CRITERIA	SCORING CRITERIA	WEIGHT
Registration and Accreditation of the Service Providers:		
a) Accredited with the relevant Sector Education and Training or Authority (SETA) Or Council for Higher Education (CHE) as an accredited service provider aligned with item 2.1. The modules/units' standards must be aligned to the National Qualifications	Accreditation letter/ certificate with SETA/ CHE = 25 No Accreditation letter/ certificate with SETA/ CHE = **disqualified**	**25**

Framework (NQF) levels which is a minimum of NQF level 5. **MOV: Accreditation letter/certificate**		
b) Endorsement with a relevant professional Body (SAICA, SAIPA, CIGFARO but not limited to) as per paragraph 2.1. **MOV: Endorsement letter**	Endorsement letter = 10 No endorsement letter = 0	**10**
c) Service Provider`s Relevant experience in any of the following critical areas: (Supply Chain Management, Financial Accounting, Asset Management, Management Accounting, Internal Control, Governance and Compliance, Risk Management, Internal Audit.) **MOV: Successful submission of proof:** • Reference letters/ Recommendation Letter from current/ previous clients indicating the service rendered by the bidder. • The letters should be in the client's letterheads and must clearly stipulate the expertise and knowledge on trainings. (**e -mails and unsigned letters** will not be considered) all documents submitted are subject to verification. All letters should not be older than 10 years.	7 Years or more experience in any of the critical areas listed = 30 5 years or more but less than 7 experience in any of the critical areas listed = 20 4 years and above but less than 5 experience in any of the critical areas listed = 15 3 years and above but less than 4 experience in any of the critical areas listed = 10 • **Years of experience will be cumulative in years and months**	**30**

d) Methodology that highlights: • Course outlines/ plan • Duration of sessions • Frequency of written assessment/ exams	All three variables = 35 Only two variables = 20 Only one variable = 10 No variable = 0	**35**
TOTAL		**100**
THRESHOLD		**70**
NB: Bidders who fail to obtain 70 points out of 100 points on functionality will not be considered for inclusion in the panel.		

7.3 Joint Ventures and Consortiums

7.3.1 Bidder(s) must submit concrete proof of the existence of joint ventures and/or consortium arrangements. LPT will accept signed agreements as acceptable proof of the existence of a joint venture and/or consortium arrangement.

7.3.2 The joint venture and/or consortium agreements must clearly set out the roles and responsibilities of the Lead Partner and the joint venture and/or consortium party.

7.3.3 The agreement must also clearly identify the Lead Partner, who shall be given the power of attorney to bind the other party/parties in respect of matters pertaining to the joint venture and/or consortium arrangement.

7.3.4 The joint venture and/or consortium arrangement must clearly indicate the percentage of ownership.

8. SPECIAL CONDITIONS OF CONTRACT

8.1 Bidder's own terms and conditions or qualifications of bid

This document contains the terms and conditions of this bid, and bidders must not change/amend the specification or come up with their own specifications.

8.2 Reservation of Rights

8.2.1 LPT reserves the right to –

a) request further information or document (s) from any bidder after closing date;
b) Communicate only with the shortlisted bidders as and when necessary;
c) Verify information and documentation of respective bidder from the NT's CSD system, South African Revenue Services (SARS), Companies & Intellectual Property Commission (CIPC), NT or any other relevant entity or visit the premises of the bidder at any time without notice. Any information received which does not correspond with the one provided in the bid document will render the bid null and void;
d) negotiate the final price; and
e) LPT reserves the right to withdraw the contract before appointment.

8.3 Termination of Contract

8.3.1 LPT reserves the right to disregard a bid or cancel the contract with the winning bidder if the bidder, –

a) has failed to comply with any legal or policy requirement that the bidder must comply with in order to enter into a valid contract with LPT, including but not limited to any public servant constituting or in the employ of the winning bidder not having the necessary permissions or authorization in terms of the Public Service Act, or not having made the necessary financial disclosures to the employer or not having declared any or all interests in the bid documents;
b) has acted in a fraudulent manner or in bad faith or in any other unsatisfactory manner in obtaining any other contract with any other state institution, government department, provincial administration or public entity;
c) after notification that the bid has been conditionally accepted, either fails, refuses or neglects or causes undue delays in the signing of the contract and service level agreement; or

8.3.2 LPT may immediately terminate the contract without any notice if any of the following circumstances occur or exist: If the bidder –

a) commits an act of misconduct or technical incompetence;

b) commits or participates in any unlawful, dishonest, or unethical act in the performance of its obligations under this contract; or

c) breaches this contract.

d) Fail to deliver the project within the stipulated time frames.

8.3.3 LPT may cancel the contract, if it is satisfied that any person (being an employee, partner, director or shareholder of the bidder or a person acting on behalf of the bidder), firm or company (The expression "person, firm or company" shall include an authorized employee or agent of such a person, firm, or company):

a) is executing a contract with government unsatisfactorily.

b) has offered, promised or given a bribe or other gift or remuneration to any officer or employee in the Public Service in connection with obtaining or executing a contract;

c) has acted in a fraudulent manner or in bad faith or in any other unsatisfactory manner in obtaining a contract with any government department, provincial administration, public body, company or person, or that he/she has managed his/her affairs in such a way that he/she has in consequence there-of been found guilty of a criminal offence;

d) has approached an officer or employee in the Public Service before or after bids have been called for, to influence the award of the contract in his/her favour.

e) has withdrawn or amended his/her bid after the time set for the receipt and opening of bids;

f) when advised that his/her bid has been conditionally accepted, has given notice of his/her inability to execute or sign the contract or to furnish any security required;

g) has disclosed to any other person, firm or company the exact or approximate amount of his/her proposed bid except where disclosure, in confidence, was necessary to obtain insurance premium quotations for the preparation of the bid;

h) LPT may, in addition to any other legal recourse which it may have, cancel the contract between LPT and such person, firm or company and /or resolve that no bid from such a person, firm or company will be favourably considered for a specific period.

8.4 Conflict of Interests

Bidders must not have or undertake duties or interests that create or might reasonably be anticipated to create an actual or perceived conflict with its duties and interests in executing the contract. Bidders must have internal control measures in place to identify potential conflicts and to bring them to the attention of LPT.

8.5 Costs incurred by bidder

LPT will not be responsible for or pay any expenses or losses which may be incurred by the bidder in the preparation and submission of this bid.

8.6 Bid binding

All written information, warranties and representations made by or on behalf of the bidder before conclusion of the contract are binding upon the bidder and are deemed to have induced LPT to enter into this contract.

8.7 Liability

The bidder is responsible and liable for-

a) the conduct, acts, and omissions of the bidder and/or agents or representatives.

b) injury to any person, theft, loss, or damage suffered by LPT, which is occasioned by any unauthorized act, omission, negligence, breach of this contract or breach of any statutory duty by the bidder or its employees, agents, or representatives of the bidder. Under such circumstances, the bidder must, at its own expense, make good the loss or damage on demand and on the terms of LPT.

8.8 Intellectual Property Rights

a) Copyright to all inventions and innovations developed using the products and methodologies offered by the bidder shall be vested in the Limpopo Provincial Administration and in the State in general. Copyright, patent rights and all similar rights in any works or products created as a result of the execution of this bid and its assignments shall vest in and are hereby transferred to the LPT, unless the contrary is agreed to in the form of individual written agreements signed by the bidder and the Accounting Officer of LPT or his/her delegate. For this purpose, all works created in terms of this bid and its assignments shall be deemed to have been created under the direction and control of LPT.

b) All data, data structures, forms and report formats designed or generated in the provision of training shall become the sole and exclusive property of LPT immediately upon acceptance of the service or service component. It is the responsibility of the service provider to hand back all data, data structures, forms, and report formats to LPT at the end of the contract.

8.9 Bidder conduct

Bidders must –

a) use and adopt reasonable professional techniques and standards in providing the service;
b) monitor project implementation against set targets, costs and timeframes.
c) provide services with all due care, skill and diligence.
d) ensure continuity of services to LPT.
e) be able to execute the contract under the supervision of Financial Management Capacity Building (FMCB) personnel.
f) comply with all industry best practices and standards issued or published by any provincial or national governing body, council or organization;
g) all reports issued by the service provider must be endorsed by the LPT, FMCB personnel;
h) ensure that senior personnel, its employees or engagement partners observe confidentiality and do not use any information obtained pursuant to this contract for any reason other than for the proper discharge of the bidder`s obligations under this contract. The bidder must have systems in place to monitor compliance in this regard;
i) not in the process of fulfilling its obligations in terms of this contract, use any labour or intellectual capacity of any employee of the state, including employees of the

LPT, for remunerative purposes, unless such employee has the necessary written authorization;

j) upon notice by LPT, revise or amend any report that the LPT is not satisfied with, within a time period specified by the LPT in that notice; and

k) immediately upon receipt of a notice from LPT, promptly replace or re-execute, at the LPT`s option, any portion of the services which within a period as determined by the LPT, from the date upon which they are delivered to the LPT are found to be defective in design or suffer from any non-conformity with this agreement;

l) The bidder must further, at its expense ensure that every person involved in the execution of this contract and engagement partners are-

m) Suitably qualified, properly skilled, experienced, trained and competent to render the Services. LPT may interview any person appointed by the Service Provider to execute this contract to test their understanding of the key deliverables in terms of this contract; and

n) Where applicable, registered with relevant professional bodies.

o) record their qualifications and professional experience in order for LPT to determine the suitability, qualifications and experience of the bidders to execute the key deliverables in terms of this bid. The training institution must be in charge of fieldwork throughout the duration of the contract. Any changes to the appointed facilitator must be done through written approval of the LPT;

p) LPT reserves the right to reject the proposed replacement. These changes to the project team should not have a negative impact on the project deliverables.

q) By bidding, the Service Provider is deemed to have satisfied itself regarding all conditions affecting this contract and must at all times comply with the manifest intent and obligations of this contract.

r) bidder must further, at its expense ensure that every person involved in the execution of this contract and engagement partners are-

s) By bidding, the Service Provider is deemed to have satisfied itself regarding all conditions affecting this contract and must always comply with the manifest intent and obligations of this contract.

9. ACCEPTANCE OF BID

9.1 Methodology

Clear deliverables agreed with LPT in line with the scope of work.

9.2 Professional Registration

Proof of professional registration of the entity and affiliation for team members must be submitted in the form of certified copies of the relevant registration documents.

9.3 Central Supplier Database registration

The bidder should be registered on the NT CSD. It remains the responsibility of the bidder to remain Tax compliant for the duration of the contract.

9.4 Appointment

Should the bid be accepted, LPT will issue a written letter of acceptance and in addition, a formal agreement will be entered between LPT and the appointed entity.

10. PAYMENT CONDITIONS

10.1 Invoices and payments

10.1.1 The Limpopo Provincial Treasury shall be responsible for effecting payments within thirty (30) days upon submission of invoice by the service provider and only after confirmation of the services rendered by the relevant Directorate.

10.1.2 LPT will not make payment to the Service Provider in the event the Service Provider fails to satisfactorily perform any of its obligations in terms of this contract;

10.1.3 No interest shall be payable in the event of a dispute nor accrue on any payments due during a period of dispute.

10.1.4 Payment is subject to the service provider meeting the deliverables as per the agreement.

10.1.5 No advance payments will be made for the execution of this project.

10.1.6 Payments will be made by an electronic transfer, into the service provider's bank account as appeared on the verified CSD report of that service provider and invoice.

11. DURATION OF THE PROJECT / CONTRACT

11.1 The duration of the contract will run for a period not exceeding thirty-six (36) months and will commence as agreed in the service level agreement signed between LPT and the appointed service provider.
11.2 No extension of the contract will be carried out without approval of LPT, and any scope deviation should also be discussed with the Project Steering Committee.
11.3 Work will be carried out as per the agreed work plan.

12. BID VALIDITY PERIOD

The bid will be valid for a period of 120 days.

13. COMPLETION OF BID DOCUMENTS

The following are minimum requirements for completion of the bid documents: -
13.1 Bidders are required to complete the entire bid document in terms of the requirements contained herein.
13.2 Bid documents, certificates, and all forms required by this bid must be completed in full and signed by the authorized signatory.
13.3 Bidder to sequentially number, index all pages submitted in the bid document and attachments.
13.4 Bidders shall ensure that there are no missing or duplicated pages. LPT shall not accept liability regarding claims by bidders that pages are missing or duplicated.
13.5 Use of correction fluid is not allowed and any cancellation, alteration or amendment on the bid document must be signed for by the authorized signatory.
13.6 Completed bid document with supporting documents shall be packaged, sealed, marked and submitted strictly as stipulated in this bid document.

14. LATE BIDS

Bids received after the stipulated closing date and time, at the address indicated in the SBD 1 form, will not be accepted for consideration and where practicable, will be returned unopened to the bidder(s).

15. GENERAL

All documents, including binders, submitted in response to this bid will become the property of the Limpopo Provincial Treasury, unless a bidder expressly indicates otherwise.

16. SUBMISSION OF DOCUMENTS, BRIEFING SESSION, AND CLOSING DATE

- Please note, it is mandatory that bid documents must be submitted, completed, and signed.
- **No briefing session will be held.**
- Closing date of the bid is on the **28 August 2026** at **11h00**