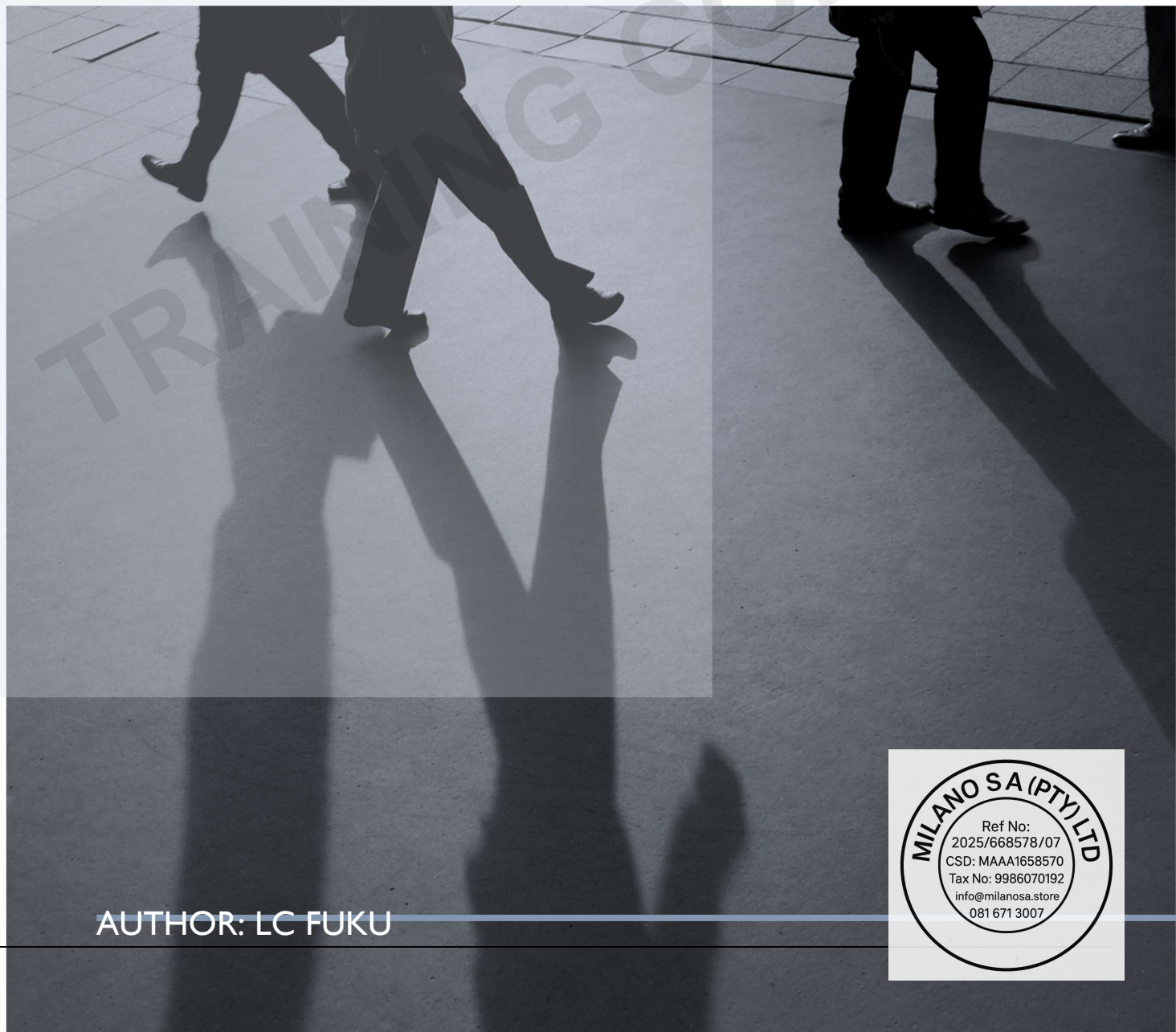




HOW TO GET A TENDER

STEP BY STEP MANUAL FOR SOUTH
AFRICAN PROCUREMENT PROCESS



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SOUTH AFRICAN GOVERNMENT TENDERING 101

A Comprehensive Roadmap for SMEs, EMEs, and Established Enterprises

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Version: 2026-2027 E-Course Edition.

Compiled & Enhanced by Luthando



COURSE OVERVIEW

Purpose:

This manual equips entrepreneurs, procurement officers, and business owners with a complete understanding of how to participate successfully in the South African public procurement system. It covers every stage—from registering a company to receiving a tender award, managing contracts, invoicing, and ensuring timely payment.

Learning Outcomes:

By completing this course, learners will be able to:

1. Navigate the legal and institutional framework governing public procurement in South Africa.
2. Properly register and maintain compliance with CIPC, SARS, and the Central Supplier Database (CSD).
3. Access and interpret tender opportunities effectively.
4. Prepare professional, compliant, and competitive bid proposals.
5. Understand evaluation criteria, scoring, and award processes.
6. Execute contract obligations and submit invoices for payment efficiently.
7. Apply lessons from case studies and avoid common pitfalls.





COURSE STRUCTURE & MODULES

Module	Title	Focus Area
1	The South African Public Procurement Framework	Constitution, procurement principles, laws
2	Setting Up Your Business for Tendering	CIPC registration, tax, and bank compliance
3	Registration on the Central Supplier Database (CSD)	Supplier identity and verification
4	Understanding Tender Portals and Opportunities	eTenders and sector-specific sources
5	Compiling Tender Documents	SBD forms, compliance checklists
6	Tender Evaluation & Scoring	PPPFA systems, functionality, and price scoring
7	Writing a Winning Bid	Technical and financial proposal writing
8	Sector-Specific Requirements	Construction, health, IT
9	B-BBEE and Transformation	Compliance and empowerment scoring
10	Common Pitfalls & Mistakes	Avoiding disqualification
11	Post-Award Contract Management	Deliverables, invoicing, and payments
12	Appeals and Legal Remedies	What to do if treated unfairly
13	Case Studies & Best Practices	Lessons from real projects
14	Resources & Reference Links	Official portals
15	Policy Trends & Future Outlook	Procurement Act 2024 reforms



MODULE 1

Overview of South African Government Procurement

Key Concepts

- **Public procurement** drives national development, economic inclusion, and transparency.
- Guided by **Section 217 of the Constitution**: fairness, equity, transparency, competitiveness, and cost-effectiveness.

Flow Chart: Public Procurement Lifecycle (Textual Description)

Need Identification → Tender Advertisement → Bid Submission → Evaluation & Award → Contract Management → Payment & Feedback

Practice Exercise

Question 1: What are the five constitutional principles governing procurement?

Answer 1:

Question 2: Why is public procurement considered a tool for transformation?

Answer 2:

References

- Public Procurement Act, 2024: [[gov.za](https://www.gov.za) link]
- PPPFA Regulations, 2017
- National Treasury Procurement Guidelines



MODULE 2

Setting Up Your Business for Tendering

Step 1: Register with CIPC

Process Summary:

1. Choose structure (Pty Ltd for most SMEs).
2. Register on **BizPortal** (R125–R175).
3. Prepare ID copies, proof of address, and MOI.
4. Receive **CoR14.3 Certificate**.
5. File annual returns.

Step 2: Obtain Tax Compliance Status (TCS)

- Register on SARS eFiling.
- Activate "Tax Status."
- Request "Good Standing."
- Receive **TCS PIN** used for verification.

Step 3: Open a Business Bank Account

- Required documents: CoR14.3, TCS, ID copies, proof of address.
- Recommended banks: FNB, ABSA, Nedbank, Standard Bank.
- Keep finances separate for compliance.

Diagram: Compliance Triangle



Practice Template

Requirement	Completed	Links
Company Registered	<input type="checkbox"/>	https://bizportal.gov.za
Tax Number Obtained	<input type="checkbox"/>	https://www.sars.gov.za
TCS PIN Active	<input type="checkbox"/>	https://www.sars.gov.za



MODULE 3

Registering on the Central Supplier Database (CSD)

Why It Matters

Without CSD registration, you cannot be considered for any government tender.

Step-by-Step

1. Visit <https://secure.csd.gov.za>.
2. Create an account.
3. Capture supplier details, bank info, tax number.
4. Upload B-BBEE certificate and certifications (CIDB, SANAS, SETA).
5. Verify all sections are "green."
6. Download CSD report (valid for 30 days).

Flowchart: CSD Registration Process

Create Account → Input Details → Verify Bank & Tax → Add Commodities → Upload Compliance Docs → Submit & Download Report

Quiz

1. What is the purpose of the 36-digit CSD number?
2. How often must you update your CSD profile?

Reference

- <https://secure.csd.gov.za>



MODULE 4

Accessing Tender Opportunities

Key Portals

Portal	Scope	URL
National eTenders Portal	All national tenders	https://www.etenders.gov.za
Provincial Department Sites	Regional tenders	Provincial.gov.za
Municipal Sites	Local tenders	Local.gov.za
Private Aggregators	Alerts and summaries	eTenderSA, FetchTenders

Practical Tip

Create alerts using your CSD commodity codes to receive relevant tender notifications.

Exercise

- Register on the eTenders portal and search for a tender relevant to your field.
- Record details: department, closing date, required documents.



MODULE 5

Compiling Tender Documents

Required Documents

- SBD 1 to SBD 9 forms.
- B-BBEE certificate.
- CSD registration report.
- TCS PIN.
- Company profile and proof of experience.

Example Checklist

Document	Attached	Signature
SBD 1	<input type="checkbox"/>	
SBD 2	<input type="checkbox"/>	
Tax Certificate	<input type="checkbox"/>	
B-BBEE Sworn Affidavit	<input type="checkbox"/>	

Quiz

1. Which SBD form covers declaration of interest?
2. How old can your CSD report be for submission?



MODULE 6

Evaluation & Scoring

The 3-Stage Evaluation Model

1. **Administrative Compliance**
2. **Functionality (Technical Capability)**
3. **Price & Preference (PPPFA 80/20 or 90/10)**

Example Score Table

Criteria	Weight	Score
Price	80	75
B-BBEE Level	20	15
Total	100	90

Practice Question

Explain the difference between the 80/20 and 90/10 scoring systems.

MODULE 7

Writing a Winning Bid

Structure

1. Executive Summary
2. Company Info & Legal Compliance
3. Technical Proposal
4. Experience & References
5. Financial Proposal
6. Risk & Quality Management

Templates

Executive Summary Example:

"Our company proposes to deliver [service/product] in full compliance with [specifications], leveraging our [experience/resources]. We commit to local empowerment (Level 2 B-BBEE) and timely project delivery."

Exercise

Write a 1-page executive summary for a sample tender in your sector.



MODULE 8–15

Each module includes:

- **Sector-specific compliance charts** (CIDB, SAHPRA, ISO).
- **B-BBEE scoring tables.**
- **Common pitfalls checklist.**
- **Invoice and payment flow (Post-Award Process):**
 - Deliver Goods/Service → Submit Invoice + Proof of Delivery → SCM Verification → Treasury Payment Run → EFT Payment
- **Appeals and Remedies Diagram:**
 - Internal Appeal (14–21 days) → Section 62 Appeal → PAJA Judicial Review
- **Case Studies** and **Policy Outlook** on Public Procurement Act 2024.
-



FINAL ASSESSMENT QUIZ

1. What are the three prerequisites before registering on CSD?
2. Outline the main evaluation stages of tenders.
3. What legal recourse is available under PAJA?
4. Why is B-BBEE important in public procurement?



APPENDICES

- **Template: Tender Submission Checklist**
- **Template: Invoice & Payment Tracker**
- **Template: Supplier Compliance Logbook**



REFERENCES

(Official verified links preserved from your source document)

1. [Public Procurement Act, 2024 – gov.za](#)
2. [CSD Registration Portal](#)
3. [SARS eFiling Portal](#)
4. [CIDB Requirements for Grading](#)
5. [SAHPRA Tenders](#)
6. [PPPFA Regulations – gov.za](#)
7. [Municipal Tender Appeals Paper – SciELO](#)

SUPREME COURT

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- For best results when selecting text to copy or edit, don't include space to the left or right of the characters in your selection.

APPELLATE COURTS

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