

REQUEST FOR PROPOSAL(RFP)

ESTABLISHMENT OF A PANEL OF ATTORNEYS TO ASSIST SAICA WITH GOVERNANCE AND LEGAL SERVICES

RFP Reference: [SAICA002/2026]

Issue Date: [14 October 2026]

**Closing Date & Time (SAST): [30 October
2026/12h00pm]**

Validity Period: [90 days]

Contact Email for Enquiries: procurement@saica.co.za



1. CONDITIONS FOR COMPLETING BID DOCUMENTS

If any of the following bid forms are not completed and signed or not handed in with your bid proposal with accompanying supporting documents on closing date and time, your proposal may be disqualified

Document	Comments	Submitted (Yes / No)
Invitation to bid	Signed	
Pricing schedule and total price	Attach annexure or addendum	
Tax Clearance Certificate	Certificate must be valid	
Vat Registration Certificate	If applicable	
Declaration of interest	Must be signed. Failure to sign will invalidate your bid.	
Certificate of Independent Bid Determination	Must be signed. Failure to sign will invalidate your bid.	
Certified copies of Company/ Close Corporation Registration Documentation	[If applicable] 1. Certificate of registration, 2. Change of name certificate (if applicable) 3. Register of directors / members, and 4. The most current registered business address 5. Certified copies of identity documents: For all current shareholders / members / individua	
B-BBEE Status Confirmation	Valid B-BBEE Certificate or B-BBEE Affidavit.	
SAICA Terms and Conditions on SAICA website are applicable (Please review and sign)	<u>SAICA-Standard-Terms-and-Conditions-2024.pdf</u>	

(a) YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE SOUTH AFRICAN INSTITUTE OF CHARTERED ACCOUNTANTS t/a SAICA
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RFP NAME: **ESTABLISHMENT OF A PANEL OF ATTORNEYS**

RFQ NUMBER: **SAICA002/2026**

CLOSING DATE: **30 October 2026** CLOSING TIME: **12:00**

PROPOSAL AND SUPPORTING DOCUMENTS MUST BE EMAILED:

Email : Procurement@saica.co.za

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

This bid is subject to the SAICA General Terms and Conditions of Contract (GCC) and, if applicable, any other special conditions of contract which will be furnished ONLY to the winning bidder(s) (s) (s).

NAME OF SUPPLIER(S).....

POSTAL ADDRESS

STREET ADDRESS

TELEPHONE NUMBER CELLPHONE NUMBER

EMAIL ADDRESS

VAT REGISTRATION NUMBER

SIGNATURE DATE.....

CAPACITY UNDER WHICH THIS BID IS SIGNED:

TOTAL PRICE INCLUDING VAT AS PER PRICING PROPOSAL.....

2. DEFINITIONS

- 2.1 **“All Applicable Taxes”** includes value-added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies.
- 2.2 **“B-BBEE status level of contributor”** means the B-BBEE status received by a measured entity based on its overall performance using the relevant scorecard contained in the Codes of Good Practice on Black Economic Empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act.
- 2.3 **“Bid”** means a written offer in a prescribed or stipulated form in response to an invitation by an entity for the provision of services, works or goods, through quotations (i.e., Request for Quotation) or advertised competitive bidding processes (i.e., tender).
- 2.4 **“Broad-Based Black Economic Empowerment Act”** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003, as amended).
- 2.5 **“Comparative price”** means the price after the factors of a non-firm price and all unconditional discounts that can be utilized have been taken into consideration.
- 2.6 **“Consortium (or joint venture)”** means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill, and knowledge in an activity for the execution of a contract.
- 2.7 **“Contract”** means the agreement that results from the acceptance of a bid by an entity and shall include any schedule, drawings, patterns, samples attached to any agreement entered and all other Schedule hereto.
- 2.8 **“Contractor(s)”** means a Bidder(s) whose bid has been accepted by SAICA.
- 2.9 **“Cost of materials”** means the cost of components, parts or materials which are intended for the production, manufacturing or assembling of the goods bid for and which are not produced, manufactured or assembled in the factory where the production, manufacture or assembly of such goods occurs, including freight, landing costs, port charges, import duties and other import costs of such components, parts or materials and all costs in connection with the handling and transport thereof prior to delivery at that factory;
- 2.10 **“EME” (Exempt Micro Enterprise)** means any enterprise with annual total revenue of R5 million or less if being measured in terms of the Codes of Good Practice (2007), or R10 million or less if being measured in terms of Codes of Good Practice (2013).
- 2.11 **“Firm Price”** means the price that is only subject to adjustments in accordance with the actual increase or decrease resulting from the change, imposition, or abolition of customs or excise duty and any other duty, levy, or tax, which, in terms of the law or regulation, is binding on the contractor and demonstrably has an influence on the price of any supplies, or the rendering costs of any service, for the execution of the contract;
- 2.12 **“Functionality”** means the measurement according to predetermined norms, as set out in the bid documents, of a service or commodity that is designed to be practical and useful, working or operating, considering, among other factors, the quality, reliability, viability and durability of a service and the technical capacity and ability of a bidder(s).
- 2.13 **“Joint Venture” or Consortium** see 2.6.

- 2.14 **“Letter of Appointment”** means the written communication by SAICA to the Contractor recording the acceptance by SAICA of Contractor’s bid subject to the further terms and conditions to be itemized in the contract.
- 2.15 **“Non-firm Prices”** means all prices other than “firm” prices.
- 2.16 **“Person”** includes a juristic person.
- 2.17 **“Purchase Order(s)”** means an official order issued by SAICA for the supply of goods pursuant to a contract or bid.
- 2.18 **“Rand Value”** means the total estimated value of a contract in South African currency, calculated at the time of bid invitations, and includes all applicable taxes and excise duties.
- 2.19 **“SAICA”** shall mean **The South African Institute of Chartered Accountants t/a SAICA** and its joint venture companies.
- 2.20 **“Signature date”** and in relation to any contract, means the date of the letter of appointment.
- 2.21 **“Sub-contract”** means the primary contractor’s assigning, leasing, making out work to, or employing, another person to support such primary contractor in the execution of part of a project in terms of the contract.
- 2.22 **“Tax Clearance Certificate”** means a tax clearance certificate issued by the South African Revenue Services (SARS) confirming that the natural or juristic person is a registered taxpayer.
- 2.23 **“Termination date”** in relation to any Contractor means the date of final delivery of services, works or goods, or the final delivery certificate.
- 2.24 **“Value Add”** means that portion of the bid price does not constitute the cost of materials.
- 2.25 **“Warranties”** means collectively any, and all warranties listed and otherwise (if any) given by the Bidder(s) in terms of this agreement.

3. CONDITIONS OF BIDDING

3.1. SAICA Terms and Conditions

SAICA terms and conditions must be downloaded and reviewed by the Service provider before signing. SAICA Terms and conditions must be signed and returned with submission.

3.2. Proprietary Information

SAICA considers this written Request for Proposal (RFP) and all related information, which is provided to the respondents, to be proprietary to SAICA. It shall be kept confidential by the respondent and its officers, employees, agents, and representatives. The respondent shall not disclose, publish, or advertise this specification or related information to any third party without the prior written consent of SAICA.

3.3. Enquiries

All communication and attempts to solicit information of any kind relative to this RFP should be in writing and channeled to email address procurement@saica.co.za before submission date.

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

3.4. Submission of RFP

Bidders are hereby informed that this procurement process will follow a Two-Envelope Submission System, comprising a Technical Proposal and a Financial Proposal. Each envelope must be clearly labeled to ensure proper handling during the evaluation process.

The Proposal and supporting documents should be submitted electronically to procurement@saica.co.za by 30 October 2026 at 12:00, labelled “**SAICA002/2026 – Establishment of a Panel of Attorneys**”.

The bidder(s) is responsible for all the costs incurred related to the preparation and submission of the bid document.

4. BID EVALUATION METHOD

This bid will be evaluated as outlined in the table below:

Stage	Method of evaluation
Stage 1	Conditions for completing bid documents: All the proposals will be evaluated against the minimum list of returnable documents. A supplier briefing will not be required.
Stage 2	Technical evaluation: Functionality requirement: The bidder must provide a technical proposal that responds to the requirements set out in the functionality evaluation criteria below, A Minimum score of 70 must be achieved to proceed to be evaluated on Stage 3

Stage 3	Price and Preference Pricing Methodology • Bidders must submit a detailed pricing schedule, including but not limited to: • Hourly rates for Partners, Directors, Associates, Professional Assistants, Consultants, and Candidate Attorneys. • Fixed fee rates for standard legal services where applicable. • Rates for litigation, dispute resolution, and specialist legal services. • Disbursement and recoverable expense rates. • Any discounts, capped-fee arrangements, or value-added services offered to SAICA. • SAICA reserves the right to assess the competitiveness, reasonableness, and sustainability of the submitted pricing. B-BBEE Preference To promote transformation and supplier diversity, only bidders with a valid B-BBEE Status Level of Contribution between Level 1 and Level 4 will be considered for appointment to the panel. Appointment to the panel will be based on: • Acceptable pricing methodology and competitiveness of rates; and • Compliance with the minimum B-BBEE requirement of Level 1 to Level 4. • Appointment to the panel does not guarantee any minimum volume of work. Legal assignments will be allocated on an as-and-when-required basis, taking into consideration the nature of the matter, the firm's area of expertise, availability, performance, and value for money.

5.ANNEXURES

A: DECLARATION OF INTEREST BY BIDDER(S) (S)

Name:

Ref No:

Any legal person, including persons employed by SAICA or persons having a relationship with persons employed by SAICA, including a blood relationship, may make an offer or offers in terms of this invitation to bid. In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons connected with or related to persons employed by SAICA, who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid, if it is required that the bidder(s) (s) or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority.

As a Service Provider I hereby declare that I, or and parties related to me (i.e., relative and friend) have a personal association with an employee at SAICA.

Name of SAICA associate	Relationship

As a Service Provider I hereby declare that neither I, nor any parties.
directly associated to me (i.e., relative and friend) have a personal
association with any employee at SAICA.

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Name of representative:

Signature: Date:

B: CERTIFICATE OF INDEPENDENT BID DETERMINATION

1. This Document must form part of all bids invited.
2. Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by, firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging). Collusive bidding is a pe se prohibition meaning that it cannot be justified under any grounds.
3. Bid rigging (or collusive bidding) occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and / or services for purchasers who wish to acquire goods and /or services through a bidding process. Bid rigging is, therefore, an agreement between competitors not to compete.
4. SAICA reserves the right to:
 - (a) disregard the bid of any bidder if that bidder, or any of its directors have abused the institution's supply chain management system and or committed fraud or any other improper conduct in relation to such system.
 - (b) cancel a contract awarded to a supplier of goods and services if the supplier committed any corrupt or fraudulent act during the bidding process or the execution of that contract.
5. I, the undersigned, in submitting the accompanying bid as stated below, certify that:
 - 5.1 I have read and I understand the contents of this Certificate.
 - 5.2 I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect.
 - 5.3 I am authorised by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder.
 - 5.4 Each person whose signature appears on the accompanying bid has been authorised by the bidder to determine the terms of, and to sign the bid, on behalf of the bidder.
 - 5.5 For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organisation, other than the bidder, whether affiliated with the bidder, who:
 - (a) has been requested to submit a bid in response to this bid invitation.
 - (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
 - (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder

- 5.6 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium will not be construed as collusive bidding.
- 5.7 In particular, without limiting the generality of paragraph 5.6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
- (c) prices.
 - (d) geographical area where product or service will be rendered (market allocation)
 - (c) methods, factors or formulas used to calculate prices.
 - (d) the intention or decision to submit or not to submit, a bid.
 - (e) the submission of a bid which does not meet the specifications and conditions of the bid; or
 - (f) bidding with the intention not to win the bid.
- 5.8 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bids invitation relates.
- 5.9 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 5.10 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the entity 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.

RFP name: RFP No.:

Name of representative:

Signature: Date:

Bidder Name:.....

6 Scope of Work

6.1 Overview

- 6.1.1 The South African Institute of Chartered Accountants (SAICA) is South Africa's leading professional accountancy body, representing Chartered Accountants and other accounting professionals who contribute to the country's economic and social development.
- 6.1.2 To support its governance, regulatory and operational responsibilities, SAICA requires access to specialist legal services across various practice areas. These include litigation and dispute resolution, disciplinary and regulatory matters, intellectual property management and protection, governance advisory services, contract law and other specialist legal services.
- 6.1.3 Accordingly, SAICA seeks to establish a panel of suitably qualified and experienced law firms to provide legal services on an as-needed basis. Firms with a strong understanding of the accounting, auditing and professional regulatory environment will be well positioned to support SAICA's requirements.
- 6.1.4 The appointed service provider(s) will be required to enter into a Master Services Agreement (MSA) with SAICA for a period of three (3) years.
- 6.1.5 Appointment to the panel will not guarantee any minimum volume of work. Matters will be allocated based on expertise, capacity, performance, availability and value for money.

6.2 Commercial Litigation services:

- 6.2.1 Assist SAICA with notices of motion and court actions.
- 6.2.2 Assist SAICA with actions or applications brought against it.
- 6.2.3 Represent and defend SAICA in court applications and actions.
- 6.2.4 Conduct settlement negotiations on SAICA's behalf, when instructed.
- 6.2.5 Assist SAICA with legal cost recovery, including taxation of bills of costs and execution of writs.

6.3 General Legal Opinions:

- 6.3.1 Provide SAICA with general legal opinions as required.

6.4 Disciplinary Matters services:

- 6.4.1 Project requirements and scope of work.
- 6.4.2 Assist SAICA with disciplinary hearings involving members, Associates, Trainees, candidate, and employees
- 6.4.3 Provide legal opinions to SAICA's disciplinary committees.
- 6.4.4 Assist with preparation for disciplinary hearings.
- 6.4.5 Present disciplinary matters on SAICA's behalf against Members/Associates/Trainees/Candidates.
- 6.4.6 Assist SAICA in defending litigation arising from disciplinary matters, including review applications.
- 6.4.7 Assist SAICA with legal cost recovery, including taxation of bills of costs and execution of writs.

6.5 Intellectual Property Services:

- 6.5.1 Conduct trademark searches.
- 6.5.2 Register intellectual property and perform related actions.
- 6.5.3 Monitor intellectual property and manage trademark renewals as they fall due.
- 6.5.4 Monitor and advise on potential infringements of intellectual property rights.
- 6.5.5 Facilitate the enforcement of intellectual property rights.

6.6 Other Specialist Areas, but not limited to the following;

- 6.6.1 Corporate governance;

- 6.6.2 Tax law;
- 6.6.3 Administrative law;
- 6.6.4 Competition law;
- 6.6.5 Company law;
- 6.6.6 Data privacy law;
- 6.6.7 Information technology law;
- 6.6.8 Labour law;
- 6.6.9 Consumer protection law; and
- 6.6.10 International law
- 6.6.11 .Areas of specialisation candidates could be a law firm that has one or more expertise in the following

item	service category	Please Tick
1	Commercial Law	
2	Constitutional and Administrative Law	
3	Litigation and pro forma prosecutorial function for SAICA Member Discipline	
4	Public Private Partnerships	
5	Intellectual Property Laws	
6	Labour Law	
7	Alternative Dispute Resolution	
8	Corporate Governance	
9	Tax Law	
10	Administrative Law	
11	Competition Law	
12	Company Law	
13	Data Privacy Laws	
14	IT Law	
15	Consumer Protection Law	
16	International Law	

6.7 Mandatory documentation (Legal)

Mandatory documentation (Legal)	Select	Comment
Certificate of registration with the Legal Practice Council		
Fidelity Insurance Certificate		

6.8 Evaluation Criteria

Proposals will be evaluated using the weighted technical criteria below. A minimum overall score of 70% is required.

No.	Evaluation Criteria	Evaluation Requirements	Score Allocation	Weight
1	Technical & General Approach: Submission of a comprehensive technical proposal demonstrating an understanding of the scope of work, methodology, deliverables, work plan, and ability to meet SAICA's requirements.	Excellent proposal that comprehensively addresses all requirements and demonstrates a sound methodology and implementation approach.	20	20%
		Good proposal that addresses most requirements with minor gaps.	15	
		Proposal partially addresses requirements with significant gaps.	5	
		Proposal does not adequately address the requirements.	0	
2	Suitable Experience and Contactable References: Demonstrated experience in providing legal services to organisations within the professional services sector and evidence of understanding the legal, regulatory, governance, and emerging industry issues relevant to the profession. Bidders must provide contactable references. Reference letters must contain: • Company name;	Five (5) or more relevant and contactable references.	30	30%
		Three (3) to four (4) relevant and contactable references.	15	
		One (1) to two (2) relevant and contactable references.	5	
		No relevant experience or references provided.	0	

	• Industry sector; • Nature of work performed; • Work was undertaken; • Contract duration			
3	Qualifications and Experience of Director / Partner / Engagement Lead Attach CVs and certified copies of qualifications.	Legal qualification completed and more than eight (8) years' experience in legal services and professional services within the legal environment.	15	15%
		Legal qualification completed and more than five (5) to eight (8) years' experience.	10	
		Legal qualification completed and more than two (2) to five (5) years' experience.	5	
		Legal qualification completed and zero (0) to two (2) years' experience.	0	
4	Qualifications and Experience of Proposed Team Members Attach CVs and certified copies of qualifications for all proposed team members.	Legal qualification completed with more than four (4) years' experience in legal services.	15	15%
		Legal qualification completed with more than two (2) to four (4) years' experience in legal services.	10	
		Legal qualification completed with zero (0) to two (2) years' experience in legal services.	5	
		No relevant qualifications or experience provided.	0	
5	Subject Matter Experts / Specialists Assigned to the Engagement Demonstrate availability of specialists with expertise relevant to the assignment. Attach CVs.	Specialist(s) with more than ten (10) years' relevant experience.	10	10%
		Specialist(s) with five (5) to ten (10) years' relevant experience.	5	
		Specialist(s) with less than five (5) years' relevant experience.	0	
6	Innovation and ICT Tools Demonstrate the use of technology, legal-tech	Market-leading innovation, automation, analytics, and continuous improvement initiatives demonstrated.	10	10%

	solutions, automation, knowledge management systems, analytics, workflow tools, and continuous improvement initiatives to enhance service delivery.	Strong technology-enabled service delivery and process improvements demonstrated.	8	
		Adequate use of technology with limited innovation demonstrated.	5	
		Basic ICT tools utilised, with largely manual processes.	2	
		No evidence of innovation or technology enablement.	0	

6.9 Minimum Required Technical Threshold

Service Providers will be required to meet a minimum of 70 points to be considered further for B-BBEE and pricing evaluation.

6.10 Financial proposal

Please provide your fee structure in accordance with the table hereunder and pricing should be inclusive of all cost levers and quoted Excluding and Including VAT

Position	Hourly rate
Director	
Associate	
Candidate Attorney	
Junior Counsel	
Senior Counsel	
Other	
Other	
Other	

****Populate the table in accordance with the firm's structure.**