

## REQUEST FOR PROPOSALS (RFP)

<b>RFP REFERENCE NUMBER</b>	<b>RFP 03-03-2023</b>	
<b>DESCRIPTION OF GOODS, WORK OR SERVICES</b>	<b>PROCUREMENT OF SUPPLY, IMPLEMENTATION AND MAINTANCE OF AVIRTUAL QUEUE MANAGEMENT SYSTEM</b>	
<b>COMPULSORY BRIEFING SESSION DETAILS</b>	<b>DATE</b>	<b>TIME</b>
	13 March 2023  Venue: 350 Witch-Hazel Avenue Eco Point Office Park, Block A, Eco Park, Centurion, Pretoria	<b>11:00</b>
<b>RFP CLOSING DETAILS</b>	<b>Date: 16 March 2023</b>  <b>Time: 11h00 a.m.</b>  <b>Email: <a href="mailto:Quotes@cbrta.co.za">Quotes@cbrta.co.za</a></b> (Bid responses received outside this email address will NOT be considered)	
<b>RFP VALIDITY PERIOD</b>	60 Working days (Commencing from the official RFP closing date)	
<b>ENQUIRIES</b>	<b>Email: <a href="mailto:Quotes@cbrta.co.za">Quotes@cbrta.co.za</a></b>	

**PROSPECTIVE BIDDERS MUST REGISTER ON NATIONAL TREASURY'S CENTRAL SUPPLIER DATABASE PRIOR TO SUBMITTING BIDS.**

## SECTION A: SBD 1

### PART A: INVITATION TO BID

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:		<b>OR</b>	CENTRAL SUPPLIER DATABASE No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	[TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	[TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES &amp; QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]</b>					

<p><b>ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?</b></p>	<p><input type="checkbox"/> Yes      <input type="checkbox"/> No</p> <p>[IF YES ENCLOSE PROOF]</p>	<p><b>ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?</b></p>	<p><input type="checkbox"/> Yes    <input type="checkbox"/> No</p> <p>[IF YES, ANSWER THE QUESTIONNAIRE BELOW ]</p>
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**QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS**

<p>IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?</p>	<p><input type="checkbox"/> YES   <input type="checkbox"/> NO</p>
<p>DOES THE ENTITY HAVE A BRANCH IN THE RSA?</p>	<p><input type="checkbox"/> YES   <input type="checkbox"/> NO</p>
<p>DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?</p>	<p><input type="checkbox"/> YES   <input type="checkbox"/> NO</p>
<p>DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?</p>	<p><input type="checkbox"/> YES   <input type="checkbox"/> NO</p>
<p>IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?</p>	<p><input type="checkbox"/> YES   <input type="checkbox"/> NO</p>
<p><b>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.</b></p>	

**PART B :TERMS AND CONDITIONS FOR BIDDING**

<b>1. BID SUBMISSION:</b>
1.1. BIDS MUST BE SUBMITTED BY THE STIPULATED TIME TO THE CORRECT EMAIL ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
1.2. <b>ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.</b>
1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
<b>2. TAX COMPLIANCE REQUIREMENTS</b>
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: .....

DATE: .....

## **SECTION B: TERMS OF REFERENCE**

### **1. Introduction to C-BRTA**

The Cross-Border Road Transport Agency (C-BRTA) is PFMA Schedule 3A Agency established through the Cross-Border Road Transport Act 4 of 1998 and provides advice, regulation, facilitation and law enforcement in respect of commercial cross border road transportation. The Act gives the C-BRTA mandate to licence commercial cross border road transport operators by issuing permits to operate. The provision of cross-border transport services in South Africa is subject to the provisions of the Cross-Border Road Transport Act. In terms of the Act, any person or organisation wishing to provide cross-border transport services must apply to the Cross-Border Road Transport Agency's Regulatory Committee for a Permit to conduct cross-border business.

The Cross-Border Road Transport Agency's (C-BRTA) thus exists, amongst others, to improve the flow of passengers and freight road transport in the region, introduce regulated competition in cross-border road transport, reduce operational constraints for the cross-border road transport industry, provide oversight and monitoring functions, and to improve the unimpeded transport flow by road of freight and passengers.

### **2. General rules and instructions**

- 2.1. Bidders or their agents shall not make any news releases concerning this RFP or the awarding of the same or any resulting agreement(s) without the consent of, and then only in co-ordination with, C-BRTA and its Client.
- 2.2. Should a bidder have reason to believe that the Functional Requirements are not open/fair and/or are written for a particular service provider or that the specification is based on a specific brand; the bidder must inform C-BRTA within five (5) days after publication of the RFP.
- 2.3. This RFP is subject to Government Procurement: General Contract Conditions – July 2011, Special Contract Conditions and any other contract conditions to be finalised during contracting.

### **3. Instructions for submitting bids**

- 3.1. Bidders should submit their bid responses strictly to [Quotes@cbrta.co.za](mailto:Quotes@cbrta.co.za). Bid responses received outside this email address will NOT be considered.
- 3.2. Bid responses will NOT be considered if submitted after the closing date and time.

3.3. All e-mailed proposal submissions are to be clearly **subject-referenced with the RFP number**. Proposals must consist of two parts, each of which must be sent in two separate emails with the following subject:

- **PART 1: Technical Proposal with RFP Number.**
- **PART 2: Pricing Proposal with RFP Number.**

#### **4. RFP Returnables**

4.1. Bidders shall submit response in accordance with the response format below. Failure to do so shall result in the rejection of the bidder's RFP response.

##### **4.2. Schedule Index:**

- Schedule 1:** Completed and signed SBD 1
- Schedule 2:** Central Supplier Database (CSD) Registration Report
- Schedule 3:** Bidder's Tax Compliance System PIN and/or valid Tax Clearance Certificate (TCC)
- Schedule 4:** Sworn Affidavit or valid B-BBEE Certificate
- Schedule 5:** Completed and signed SBD 4 – Bidder's Disclosure
- Schedule 6:** Completed and signed SBD 6.1 – Preference Points Claim
- Schedule 7:** Technical Proposal
- Schedule 8:** Pricing Proposal

#### **5. C-BRTA's Rights**

5.1. C-BRTA is entitled to verify any information, amend the RFP specification, extend the bid validity period or extend the bid closing date, all before the bid closing date. All bidders, to whom the RFP documents have been issued, will be advised in writing of such amendments in good time.

5.2. C-BRTA reserves the right to request all relevant information and other documents to verify information supplied in the bid proposal.

#### **6. Undertakings by the bidder**

6.1. By submitting a bid in response to the RFP, the bidder will be taken to offer to render all or any of the services described in the bid response submitted by it to the C-BRTA.

6.2. The bidder agrees that the offer contained in its bid shall remain binding upon him/her and receptive for acceptance by the C-BRTA during the bid validity period indicated in this RFP.

6.3. The bidder accepts that any mistakes regarding prices and calculations will be at their own risk.

## **SECTION C – FUNTIONAL REQUIREMENTS SPECIFICATION**

**Bidders are invited to quote for supply, implementation and maintenance of virtual Queue Management System for a period of 12 months.**

### **1. Background**

The C-BRTA intends to implement a virtual Queue Management System at its walk-in centre situated at Centurion offices in Pretoria. The objective is to streamline the flow of clients in the walk-in centre, whilst increasing the productivity of staff and reducing the waiting times in the queues.

### **2. SPECIFICATION**

- The supply and implementation of a Virtual Queue management solution (including but not limited to the software, hardware and licenses to support the solution).
- Providing 12 months post implementation support and maintenance.
- Providing training and user manuals (Administrator and Super user training for updates and other related functional activities). Consideration for e-Training should be included.
- Provision for enhnacements (120 hours on time and material basis for duration of the contract). Bidders to provide pricing and rate per hour as part of the proposal.
- Solution documentation-Functional and technical specifications.

#### **The successful bidder shall:**

- The scope of work includes supplying of hardware, software, setup and customization, installation, cabling and sundries (consumables).
- Provide system support and maintenance services. This entails, but not limited to ensuring that the C-BRTA Virtual Queue Management System (QMS) is functional, continuously updated and easy to use as required by the C-BRTA and its stakeholders within defined turn-around times (turnaround times to be agreed upon between the appointed supplier and the C-BRTA at contract stage).

- The service provider must adequately service all components of the provided QMS so that it is continuously in good operational state.
- The service provider shall update all software components of the QMS system with the latest stable version available.
- The service provider shall replace all components of the QMS system that reach out of support status with functionally equivalent supported components.
- The proposed Queue Management System should be compatible with the .Net Microsoft technology as it will need to be integrated with the CBRTA permit management system built on the .Net platform.
- Provide user, functional and system support training including manuals.
- The service provider must provide comprehensive documentation regarding the integration capabilities of the QMS system. This documentation must include description of how to invoke services on the QMS system by other systems and how the QMS system can invoke services at other systems.
- The system must generate reports on a monthly basis, as agreed with the C-BRTA to include, but not limited to the following:
  - No-show/pending tickets rates
  - Return rates
  - Service outcome and duration
  - Average wait times
  - Time spent by each officer per process
- Be available for progress meetings as requested by C-BRTA.
- The service provider may be required to be available for work at short notice and beyond normal working hours as may be applicable to any project or campaign throughout the contract period.
- Regular innovation of the solution as agreed with the C-BRTA.
- Any updates done by the appointed service provider, will be done under the C-BRTA's approval.

### **3. FUNCTIONALITY OF THE SOLUTION**

The following are the minimum requirements of the solution:

#### **3.1. Primary Requirements**

- A virtual Queue management system with a ticket dispensing kiosk and App should have the capability to display a list of service types as defined by the C-BRTA for the client to select from for walk-in clients.

- The ticket dispensing kiosk and App should be able to issue uniquely numbered ticket and digital tickets (i.e. No number duplication).  
Have the capability for the ticket dispensing kiosk and App to issue paper or digital ticket or number based on the service or enquiry type that is selected by the client. Preferably the system must also have an App in order to issue tickets.
- The ticket dispensing kiosk or App should have the ability to print the content within the ticket or display on the app with certain information highlighted e.g. ticket number in a bigger font, bold and date and time stamp in smaller font, etc.
- Early warning when consumables reach low level marks.
- Alerting if there is a technical problem with the kiosk or App or system.

### **3.1.1 Customer feedback**

- The solution should provide a functionality to allow the client to provide feedback after receiving service.

### **3.1.2 Virtual Queue management application**

The Queue management application should have the ability to manage/execute but not limited to the following functions:

- Allows clients to select a service, receive a number in the queue, maintain their place in the queue without standing in a line, and be notified when it's their turn for service (virtual queue).
- User Administration/management to manage client service agent access.
- System administration to allow a C-BRTA user to apply basic configuration changes without requesting support from the service provider.
- Control/Configuration for ticket dispensing kiosk or App.
- Control/Configuration for the agent workstations and roles.
- Control/Configuration for various types of information displays.
- Control/Configuration for the audible and display alert notifications.

### **3.1.3 Integration Requirements/Capabilities:**

- The QMS should have the capability to integrate with the C-BRTA Permit Management system based on Microsoft .Net Framework system.
- Real-time integration with the C-BRTA Permit Management system to fetch relevant information for service type identification.
- The display screens or App must have the capability to display infotainment contents either from the QMS system itself or from an external source.

### **3.1.4 Service Agent's activity**

- The agent's servicing the client should have the ability to do the following, from a centralised admin console:
  - Start the service time, as they welcome the client.
  - Stop the service time, as the client's query is resolved or escalated (and the client has left the cubicle and the agent completed the wrap-up activities).
  - Calls for the next person in Queue.
  - Pend the ticket, if there is a no show from client. The client position in the queue will then be moved down the queue a pre-configured number of places, or to the bottom of the queue and will be given another chance to be serviced.
  - Reroute the ticket or electronic ticket if unable to resolve the query or in case of a different query to what the ticket says.
  - Close the desk or system, when the agent desk is inactive or unable to service clients.
  - Activate/ Reactivate the desk to start receiving the clients.

### **3.1.5 Supervisor's activity:**

The supervisor managing the queue management operations should have the ability to do the following:

- Monitor the average waiting time per service type.
- Communicate with the Agent via the Queue management application and provide support and assistance as required.
- Start / Stop the Queue management operation, as a beginning of the day / end of the day activity.
- Monitor and measure queuing performance.
- Dashboard that offers a wide view of all service/activities in a walk-in centre.
- Must have the ability to assign and reassign the client service agents to a service, based on supervisor discretion.
- Capability to provide a supervisor/manager dashboard view to monitor the queue.

### **3.2 Non-functional requirements:**

- Integrated Multimedia functionality (voice & visual).
- The solution must be compatible with Microsoft Windows 10 64-bit operating systems and above.

- Should the service provider require the use of a server provisioned by the C-BRTA, the server operating system will be Microsoft Windows 2016 or higher. The server configuration must comply with the security requirements of the C-BRTA.
- Must be a resilient solution with high availability.
- Any server that is required to be hosted in the C-BRTA data centre must be capable of running as Microsoft Hyper-V virtual server.

### **3.3 Virtual Queue management reporting requirements (Real time reporting)**

The QMS must have customizable real time reports but not limited to the following:

- Number of clients serviced per service type
- Average waiting time per service type
- Average service times
- Number of abandoned tickets
- Average service time (per client)
  - Per Service type.
  - Per Service Desk.
  - Per User (Client Only)
- Real-time reporting on the longest wait time.
- Customer feedback report per service type per agent
- Average and longest waiting time per service type.
  - Average service time (per client):
  - Per Service type
- Customer feedback report per service type per agent.
- Dashboard that must be available to the team leaders, must include but not limited to the following:
  - Number of clients serviced
  - Type of clients serviced
  - Average waiting times
  - Average service times
  - Number of abandoned tickets

## **4. BIDDER EXPERIENCE**

- The prospective service provider must have a minimum of five years' experience in implementation of Queue management system.

- All bidders are required to submit at least 5 references, where similar services have been provided. At least 3 of the sites must be active with the ability for C-BRTA to conduct site visits if deemed necessary.

**5. COMPLETION DATE**

The system implementation must be completed within 4 weeks from the date of signing the contract with a successful service provider.

**6. TECHNICAL EVALUATION**

The proposals will be evaluated based on 80/20 preferential procurement system as follows:

<b>Evaluation Criteria</b> - The supply and implementation of the virtual Queue management system and support services			
Preference Points 80/20 80 points = Price 20 points = BBBEE			
<b>Take note: A prospective who obtains less than 70 points in the Functionality Phase (Phase 1A) shall not be evaluated further.</b>			
100 points = Functionality			
<b>FUNCTIONALITY – PHASE 1A (100 points)</b>			
Technical skills of key resources for supply and implementation of virtual Queue Management system <b>(10 points)</b>			
The competence of key resources that will supply and implement the virtual Queue Management system, emphasis must be on the expertise and experience in technical areas comparable to the project.			
Provide CV's of the team (replacements must be professionals with the same expertise and experience). Information required must include the following:			
i. Experience in years per resource demonstrating role and organisation where the resource successfully configured, implemented and supporting similar solutions.			
Technical areas	<b>5+ years</b>	<b>3-5 years</b>	<b>1-2 years</b>
Implementation	5 points	3 points	2 points
Support and Maintenance	5 points	3 points	2 points

Past performance of the organization and relevant experience for for the supply and implementation of virtual Queue management system and support services **(20 points)**

The bidder demonstrates relevant, recent experience in the supply and implementation of virtual Queue Management systems and support services thereof.

**Details, experience and track record including:**

Provide details of projects successfully completed locally of similar scope and complexity over the last 5 years.

<b>7+ projects</b>	<b>5-6 projects</b>	<b>3-4 projects</b>	<b>1-2 projects</b>	<b>Less than 1 project</b>
20 points	15 points	10 points	5 points	0 points

The information required must include the following:

- Client name and contact details
- Description and relevance to the tendered project
- Project cost or number of hours
- Duration of project (indicate start and end date)

The C-BRTA reserves the right to visit or contact the bidder’s references.

**Technical Evaluation (70 points)**

Bidders are required to demonstrate the technical approach for the project that will ensure successful deployment of the following:

Full points (per criteria) will be allocated for sufficient information that is provided in the proposal that demonstrates the technical approach, and zero (0) points will be allocated (per criteria) for no, poor or insufficient information provided.

<b>Criteria</b>	<b>Points Allocated</b>
<p><b>Primary Requirements</b></p> <p>Describe in detail how the bidder intends or has the capability and capacity to satisfy the requirements as specified in section 4.1</p>	15 points
<p><b>Customer feedback</b></p> <p>Describe in detail how the bidder intends or has the capability and capacity to satisfy the requirements as specified in section 4.1.1</p>	5 points
<p><b>Queue management application</b></p> <p>Describe in detail how the bidder intends or has the capability and capacity to satisfy the requirements as specified in section 4.1.2</p>	20 points

<b>Service Agent’s activity</b> Describe in detail how the bidder intends or has the capability and capacity to satisfy the requirements as specified in section 4.1.4	5 points
<b>Supervisor’s activity</b> Describe in detail how the bidder intends or has the capability and capacity to satisfy the requirements as specified in section 4.1.5	5 points
<b>Integration Requirements/Capabilities</b> Describe in detail how the bidder intends or has the capability and capacity to satisfy the requirements as specified in section 4.1.3	10 points
<b>Non-functional requirements</b> Describe in detail how the bidder intends or has the capability and capacity to satisfy the requirements as specified in section 4.2	2 points
<b>Real time reporting</b> Describe in detail how the bidder intends or has the capability and capacity to satisfy the requirements as specified in section 4.3	2 points
<b>Methodology and Approach</b> Project implementation Schedule with an outline of key deliverables per milestone and related resource allocation. Key project dependencies must also be clearly indicated.	2 points
<b>Methodology and Approach</b> Proposed Quality Assurance approach for the deliverables.	2 points
<b>Methodology and Approach</b> Support model for provision of the QMS support and maintenance services.	2 points
<b>DEMONSTRATION OF PROPOSED SOLUTION – PHASE 1B (100 points)</b>	
Please note: Bidders who score <b>LESS than 70 points</b> on this phase (PHASE 1B) shall not be considered for further evaluation on <b>Price and BBEE</b> .	
<b>Presentation (100 Points):</b> Bidders must provide a PowerPoint presentation in accordance with the scope of work.  Full points (per criteria) will be allocated for sufficient information that is provided in the presentation that demonstrates the technical approach, and zero (0) points will be allocated (per criteria) for no, poor or insufficient information provided.	
<b>Criteria</b>	<b>Points Allocated</b>
Primary Requirements	20 points
Customer Feedback	15 points
Queue management application	30 points

Service Agent's activity	5 points	
Supervisor's activity	5 points	
Integration Requirements/Capabilities	20 points	
Real time reporting	5 points	

## SECTION D: STANDARD BIDDING DOCUMENTS

### BIDDER'S DISCLOSURE

### SBD 4

#### 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 interest<sup>1</sup> 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

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<sup>1</sup> 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.

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

2.2.1 If so, furnish particulars:

.....  
 .....

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

2.3.1 If so, furnish particulars:

.....  
 .....

**3 DECLARATION**

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

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

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

3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium 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.

- 3.5 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.
- 3.6 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.
- 3.7 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**

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

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 The maximum points for this tender are allocated as follows:

	POINTS
<b>PRICE</b>	<b>80</b>
<b>SPECIFIC GOALS (B-BBEE Certificate and/or sworn affidavit included)</b>	<b>20</b>
<b>Total points for Price and SPECIFIC GOALS</b>	<b>100</b>

1.5 Points for specific goals for this tender will be allocated on the basis B-BBEE Status Level as shown in Table 1 below.

1.6 In order to claim points for specific goals, bidders must submit B-BBEE Certificate and/or sworn affidavit, as the case may be.

1.7 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.

- 1.8 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:

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

Where

P<sub>s</sub> = Points scored for price of tender under consideration

P<sub>t</sub> = Price of tender under consideration

P<sub>min</sub> = 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:

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

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 tenderers: The tenderer must indicate how they claim points for each preference point system. Thus, tenderers are required to indicate number of points in line with their B-BBEE Status Level in the table***

The specific goals allocated points in terms of this tender (B-BBEE Status Level of Contributor)	Number of points allocated (80/20 system)	Number of points claimed (80/20 system) (To be completed by the tenderer)
1	20	
2	18	
3	14	
4	12	
5	8	
6	6	
7	4	
8	2	
Non-compliant contributor	0	

**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.

.....	
<b>SIGNATURE(S) OF TENDERER(S)</b>	
<b>SURNAME AND NAME:</b>	.....
<b>DATE:</b>	.....
<b>ADDRESS:</b>	.....
	.....
	.....