

SECTION A: BID ADVERT

SBD1

PART A INVITATION TO BID

Bid Description	BID DOCUMENT FOR PROCUREMENT OF A SERVICE PROVIDER TO PROVIDE HELPDESK SYSTEM SUPPORT TO EPWP OVERALL PROGRAMME										
Bid number	IDTDPW52NATN-HELPD101025										
Name of institution	Independent Development Trust (IDT)										
The place where goods, works or services are required	IDT National Offices										
Closing date and time	Date	07	11	2025						Time	12h00 pm
Contact details	Physical address			IDT National Office Glenwood Office Park, Cnr Oberon and Sprite Streets, Faerie Glen 0043.							
	Tel			012 845 2000							
	email			SFTenders@idt.org.za							
	Contact person			Tshenolo Molefe							
Where bids can be collected	IDT website www.idt.org.za/business-opportunities/current-tenders/ and the National Treasury e-Tender Portal available on www.treasury.gov.za										
Where bids must be delivered	IDT National Office Glenwood Office Park, Cnr Oberon and Sprite Streets, Faerie Glen 0043.										
Category (Goods/ Services)	Services										
Sector	EPWP										
Supplier Details											
Name of bidder											

Board of Trustees: Ms. Zimbini Hill (Chairperson), Prof. Raymond Nkado (Deputy Chairperson), Ms. Lerato Kumalo, Ms. Thobile Maloka, Dr. Deenadayalen Konar, Mr. Neil Jansen, Mr. Derek Naidoo, Ms. Sekadi Phayane-Shakhane, Ms. Bongekile Zulu, Mr. Matodzi Ratshimbilani, Prof. Stella Bvuma, Mr. Wayne Manthe

Acting Chief Executive Officer: Ms. Carmen-Joy Abrahams
Trust Registration No: IT 669/91

Postal Address						
Street Address						
Telephone Number	Code		Number			
Cell phone Number						
Email Address						
Supplier Compliance Status	Tax Compliance System PIN		and	Central Supplier Database No:	MAAA	

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, 2017, 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:

SECTION B: ADDITIONAL TERMS AND CONDITIONS FOR BIDDING

1. TERMS AND CONDITIONS

ITEM	DESCRIPTION
1.1 Request For Quotation Issue Date	28 October 2025
1.2 Compulsory Briefing	There is no briefing session
1.3 Bid Reference No.	IDTDPW52NATN-HELPD101025
1.4 Enquiries	Any queries shall be directed in writing to the IDT through the email. Email: SFTenders@idt.org.za
1.5 Mandatory Requirements	1.5.1 Authority to Sign the Bid Document and all Annexures (see bid document). Only the person authorised to sign the bid documents MUST sign this bid document.
	1.5.2 Company Registration Documents
	1.5.3. Valid COIDA Certificate
	FAILURE TO SUBMIT ANY OF THE ABOVE WILL LEAD TO DISQUALIFICATION
1.6 Mandatory Administrative Requirement	1.6.1 Submission of fully completed and signed Invitation to Bid (SBD 1)
	1.6.2 Submission of fully completed and signed Bidder's Disclosure (SBD 4)
	1.6.3 Submission of fully completed and signed Bidder's Price (SBD 6.1)
1.7. Returnable documents	The following returnable documents shall be submitted together with the bid. The validity of this documentation will be verified at the time of award.
	1.7.1. Full Report of Central Supplier Database
	1.7.2. Valid Tax Compliance Letter with a unique pin
	1.7.3. Proof of residence (proof of ownership or lease contract or municipal services bill)
1.8. Evaluation Criteria	This bid will be evaluated in three stages
	1.8.1. Mandatory Requirements
	1.8.2. Functionality Criteria
	1.8.3. 80/20 Preferential Point System
	Only Bidders who have passed functionality will be evaluated further. A minimum threshold for functionality is 80 points.
1.9. Submission of Bid documents	1.9.1 Bids must be delivered on or before the closing date and the time as per the advert.
	1.9.2 Bidders must sign the Bid Submission Register upon delivery of the bid at the national office. Bidders not on the Bid Submission Register will not be considered. This applies to bids which are submitted through Courier companies. Bidders MUST inform their Courier Companies to sign the Bid Submission Register in the name of the bidder.
	1.9.3 Bids submitted after the closing time will not be considered.
	1.9.4 Bid documents shall be hand-delivered in 1 combined pack (i.e. Bid document and its accompanying Annexures) to the Implementing Agent (IDT) and shall be marked as follows:

ITEM	DESCRIPTION
	Marked Confidential Bid and Indicate the following: BID NUMBER: IDTPW52NATN-HELPD101025 BID DESCRIPTION: BID DOCUMENT FOR PROCUREMENT OF A SERVICE PROVIDER TO PROVIDE HELPDESK SYSTEM SUPPORT TO EPWP OVERALL PROGRAMME THE BID BOX WILL BE LOCATED AT THE IDT NATIONAL OFFICE MAIN RECEPTION AREA AS PER THE ADDRESS INDICATED ON THE BID DOCUMENT. NB: Emailed or Faxed bid documents will be disqualified.
1.10. Notes to bidders	1.10.1. The bid shall be valid for 60 calendar days. 1.10.2. Bidders' queries will be attended to until 05 November 2025. Use email provided in 1.4 above to raise any query. 1.10.3. Should bidders not receive any correspondence after 60 days of the validity period then bidders should consider their application unsuccessful. 1.10.4. Bids must be submitted on the official forms, which are provided as part of the bid document.
1.11. Company Resources	1.11.1. The bidder is to provide details of a minimum of two (2) human resources to be used in the project and attach proof of their relevant qualifications (qualification and details of personnel). 1.11.2. Such human resource shall always be available for the project during the contract period. Should assigned human resource be changed for some other reason, he/she should be replaced by a person/s of equivalent or higher qualification.
1.12. Cancellation Costs	1.12.1. Should the programme be cancelled by the client Department due to financial constraints and/or other reasons, the IDT and the Client Department shall not be liable to remunerate the service provider for any potential loss of business and/or profit.
1.13. Base office	1.13.1. The base office must be in Gauteng province.
1.14. IDT's Reservation of Rights	1.14.2. IDT reserves the right to conduct a risk assessment if the recommended bidder is the responsive bidder and has already been awarded a contract in the IDT. 1.14.3. IDT reserves the right to negotiate with the bidder for the price. 1.14.4. IDT reserves the right to cancel or withdraw this request for bid without prior notice and without furnishing any reasons whatsoever. 1.14.5. IDT reserves the right to subject Bidders and their facilities to assessment as part of the evaluation process or as a condition to be appointed. 1.14.6. The IDT reserves the right to amend, modify, withdraw this Bid, or terminate any of the procedures or requirements set out herein at any time and from time to time, without prior notice and without liability to compensate or reimburse any person.

ITEM	DESCRIPTION
1.15. Bid Document and Contract	1.15.1. Bidders are advised to ensure that they familiarise themselves with all the contents of the Bid documents, as those will form the basis of the contract to be entered into. Any contents of this document that the bidder requires clarity on shall be brought forward before the Bid submission date stipulated in this Bid document.
	1.15.2. Note: The Bid Document must be completed using permanent black ink.
	1.15.3. The Bid document must be bound and be in a sealed envelope.
	1.15.4. All Bid documents submitted to the IDT will become the property of the IDT and will as such not be returned to the bidders. Proprietary information should be identified as such in each proposal.
	1.15.5. If the IDT amends this bid document, the IDT will issue an erratum.
	1.15.6 This document must be used solely for the purpose it is intended to achieve.
	1.15.7 The Company will be expected to enter into a contract with the IDT.
	1.15.8 Bidders who are blacklisted with the National Treasury will be eliminated, therefore, not considered any further evaluation.
1.16. Duration Of Contract	1.16.1. The project is estimated to take four (4) months to complete.
1.17. Conflict of Interest	1.17.1 The service provider cannot have participated in the HelpDesk System preparation, formulation, and/or implementation (including the writing of the programme documents) and should not have a conflict of interest with the programme's related activities.

SECTION C: EVALUATION METHOD

2. BID EVALUATION METHODOLOGY

The Three-stage evaluation method will be used for the appointment of the Service Provider for the HELPDESK System for the EPWP Overall Support Programme.

2.1 Compulsory Requirements

The compulsory requirements are gatekeeper criteria and must be satisfied by the bidders before functionality evaluations. Failure to satisfy any of these requirements will lead to disqualification.

2.2 Functionality Criteria

All bidders who satisfy the Compulsory Requirements are evaluated further for functionality. This part of the evaluation looks at the following:

FUNCTIONALITY CRITERIA:
1. PREVIOUS COMPANY EXPERIENCE
2. TECHNICAL QUALITY OF THE PROPOSAL (with emphasis on methodology)
3. TEAM LEADER EXPERIENCE
4. TEAM LEADER QUALIFICATION
5. TEAM MEMBER(S) EXPERIENCE
6. TEAM MEMBERS QUALIFICATIONS

Only the Bidders that obtain a threshold of 80 points will be considered further. The Bidders which fail to meet a threshold of 80 points, will be eliminated at this stage.

2.3 Price

The specific goals for this bid will be on 80/20 preference points.

SECTION D: ABOUT THE BIDDER

3. BACKGROUND OF THE BIDDER

3.1 BIDDER'S DETAILS

Please complete the required information below:

Name of the Organisation	
Registration number	
Contact telephone number	
Contact mobile number	
Email address	
Web address (if available)	
Physical Address	
Key Contact person	
Alternative contact person (Name and contact number)	

DECLARATION:

I..... (Name and Surname), Identity number.....in my capacity as..... confirm that I have provided information which is to the best of my knowledge complete, true and correct.

Signed at..... (Place) on theday of.....(month) of 2025.

SECTION E: TERMS OF REFERENCE

Introduction

The Independent Development Trust (IDT) is a public entity established by the South African government to support socio-economic development in the country. As part of its commitment to effective service delivery, the IDT intends to strengthen its support functions to the EPWP by adopting ITIL best practices within its helpdesk operations. These practices will guide the management of service requests, incident resolution and performance reporting to ensure consistent and measurable service standards.

The Department of Public Works and Infrastructure (DPWI), as the coordinating department, oversees the implementation of the Expanded Public Works Programme (EPWP). To support this function, the department has developed an online reporting platform through which public bodies implementing EPWP projects are required to capture and submit performance data. There are currently more than 3 000 registered users on the system.

To ensure effective technical support for DPWI and participating public bodies, the IDT has established a dedicated helpdesk applying ITIL-aligned service management principles. The helpdesk provides structured support for all technical issues related to the EPWP online reporting platform. The team consists of ten (10) officials, each assigned to specific provinces or national departments, responsible for managing queries, escalating incidents, and tracking resolutions in accordance with defined service standards.

The purpose of this bid is to appoint a service provider for the provision of SaaS (Software as a Service) Helpdesk System with WhatsApp integration to support the IDT's EPWP Helpdesk operations. The system must facilitate efficient query management, ticket tracking and reporting while aligning with ITIL best practices to improve service coordination, responsiveness and accountability across all supported public bodies.

Purpose of the Terms of Reference (TOR)

Establish a fully operational EPWP Helpdesk System to:

- Provide first-line user support for the EPWP reporting system.
- Assist with technical queries, password resets, access requests and data entry challenges.
- Ensure effective communication and escalation of system-related issues to relevant parties.
- Maintain high levels of user satisfaction, data integrity and responsiveness.

Scope of Work

- Operational EPWP Helpdesk system.
- Provide licenses for 10 officials (6 x Information System Support Officers, 1 x Programme Coordinator, 1 x National Programme Manager and 2 x DPWI Officials).
- Provide support to EPWP users nationally using selected channels i.e. email and WhatsApp.
- Respond to and resolve queries related to system access, reporting guidance, user registration and general EPWP-RS usage.
- Log, track and escalate unresolved technical issues to the system administrator, EPWP-RS service provider or system support team.
- Maintain a query resolution log, response times, and feedback for quality assurance.

- Provide monthly Helpdesk performance reports with analysis of common issues, turnaround times and recommendations.
- Training of helpdesk officials where necessary.
- Additional workflows if necessary.
- Audit trail.

Key Deliverables

- A functional Helpdesk system with WhatsApp and email integration for user communication and query handling.
- A secure and backed-up Helpdesk management platform or ticketing system.
- Monthly performance and issue-tracking reports.
- Quarterly stakeholder feedback summaries on Helpdesk service quality.
- End of the year Helpdesk review report with recommendations for improvement.

Confidentiality and Data Protection

All data and information accessed through the Helpdesk function must be treated as confidential. The service provider must comply with the Protection of Personal Information Act (POPIA) and any applicable data protection regulations.

Project Time Frame

- The helpdesk service will be for a period of four (4) months and the project will commence immediately after appointment.
- Discussion and finalisation of the inception report will take five days (5) after appointment.
- System performance report should be submitted on the last day of every week.
- A monthly consolidated report should be submitted on the last day of the month.
- Financial claims should be supported with monthly performance consolidated reports on a monthly basis.

Note: *The Service Provider will be required to ensure that regular meetings with the project management team are held to report on progress.*

CONTRACTING DETAILS

The service provider will be contracted by the IDT to provide the service. This will be based on the proposal. The service provider shall be accountable to the IDT.

SECTION F: TECHNICAL EVALUATION

4. EVALUATION CRITERIA FOR FUNCTIONALITY

4.1 Functionality Criteria

All **bidders** who satisfy the Compulsory Requirements are evaluated further for functionality. This part of the evaluation looks at the following:

FUNCTIONALITY CRITERIA:	WEIGHT
1. PREVIOUS COMPANY EXPERIENCE	20
2. TECHNICAL QUALITY OF THE PROPOSAL (with emphasis on methodology)	43
3. TEAM LEADER EXPERIENCE	05
4. TEAM LEADER QUALIFICATION	20
5. TEAM MEMBER(S) EXPERIENCE	05
6. TEAM MEMBERS QUALIFICATIONS	7
Total	100 Points

Only the Bidders which obtain a threshold of 80 points will be considered further. The Bidders which fail to meet a threshold of 80 points will be eliminated at this stage.

FUNCTIONALITY EVALUATION SCORECARD

Functionality criteria:	Points:
1. PREVIOUS COMPANY EXPERIENCE a) Bidders must attach the company profile (5 points) ▪ None submission of company profile (0 points) ▪ Submission of company profile (5 points) b) Previous experience based on a number of projects (list three projects) of similar nature successfully completed from 2020 to 2025. Company experience will be evaluated through reference letters from clients for the projects mentioned above. Letters must include the project names, dates of when the projects were executed, contacts of references, cost of the project undertaken, etc. (15 points) ▪ None submission of reference letters (0 points) ▪ Submission of one reference letter (5 points) ▪ Submission of two reference letters (10 points) ▪ Submission of three reference letters (15 points)	20
1.2. TECHNICAL QUALITY OF THE PROPOSAL (with emphasis on methodology) The technical quality of the proposal will be assessed based on the following criteria: (c) Establish a fully operational EPWP Helpdesk System ▪ Service Design- Outline how the helpdesk will be structured, operated and managed (9 points) ○ Outline of the HelpDesk service (3 points) ○ Outline implementation stages of the HelpDesk service using ITIL processes (3 points) ○ Performance matrix (3 points) (d) Operational EPWP Helpdesk system (34 points) ▪ Incident Handling - How queries are logged, tracked, and resolved using ITIL steps (9 points) ○ How queries are logged (3 points) ○ How queries are tracked and escalated (3 points) ○ How queries are resolved (3 points) ▪ Service Levels - How response times and reports are managed (5 points) ▪ Training & Knowledge - How helpdesk staff will be trained and supported (5 points). ▪ Improvement Plan - How the supplier will monitor and improve the service (8 points) ○ Monitoring of HelpDesk service (4) ○ Continuous Improvement of HelpDesk service (4)	43

▪ Problem Management - How recurring issues are handled and escalated (7 points) ○ How recurring issues are handled (4 points) ○ How recurring issues are escalated (3 points)	
3. TEAM LEADER EXPERIENCE. (Bidders must attach detailed CV's of the team leader specifying relevant experience and dates). ▪ Less than 3 years of relevant experience (0 points) ▪ 3 years of relevant experience (2 points) ▪ 4 years of relevant experience (3 points) ▪ 5 years of relevant experience and above (5 points)	05
4. TEAM LEADER QUALIFICATION. Team leader must possess a minimum of a degree (NQF 7) qualification in Information Technology (IT) and ITIL Foundation Certificate (v3 or v4 certified). (Bidders must attach certified copies of the educational qualification of the team leader). ▪ No required qualification provided = 0 ▪ NQF 5 (Higher certificate plus ITIL Foundation Certificate) = 5 ▪ NQF 6 (IT Diploma plus ITIL Foundation Certificate) = 10 ▪ NQF 7 (IT Degree/BTech plus ITIL Foundation Certificate) = 20	20
5. TEAM MEMBER(S) EXPERIENCE. (Bidders must attach a detailed CV of the team member(s) specifying relevant experience and dates). ▪ Less than 2 years of relevant experience (0 points) ▪ 2 years of relevant experience (2 points) ▪ 3 years of relevant experience (3 points) ▪ 4 years of relevant experience and above (5 points)	05
6. TEAM MEMBERS QUALIFICATIONS. ▪ No required qualification provided = 0 ▪ NQF 5 (Higher certificate) = 3 ▪ NQF 6 (IT Diploma) = 7	7
Total:	100 Points

6. COMPULSORY BRIEFING SESSIONS

There is no briefing session

SECTION G: RETURNABLE DOCUMENTS / SUBMISSION

CHECKLIST

Returnable documents **MUST** be submitted together with the bid document. Failure to submit any of the Compulsory Requirements will result in the automatic elimination of the bidder.

RETURNABLE DOCUMENTS/SUBMISSION CHECKLIST	Mark with an (X)
Authority to Sign the Bid Document and all Annexures	
Company Registration Documents	
Valid COIDA Certificate	
Submission of fully completed and signed Invitation to Bid (SBD 1)	
Submission of fully completed and signed Bidder's Disclosure (SBD 4)	
Submission of fully completed Preference Points Claim form in terms of the Preferential Procurement Regulations 2022 (SBD 6.1)	
Full Report of Central Supplier Database	
Valid Tax Compliance Letter with a unique pin	
Proof of bidder residence (proof of ownership or lease contract or municipal services bill)	

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 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:

.....

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.

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.
- 3.5 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

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.

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

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

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

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 To be completed by the organ of state

- a) The applicable preference point system for this tender is the **80/20** preference point system.
- b) **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	90	80
SPECIFIC GOALS	10	20
TARGETED GROUP		
Women	3	6
Youth	3	6
People with Disabilities	2	4

Black People	2	4
Total points for Price and SPECIFIC GOALS	100	100

- 1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.
- 1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

A maximum of 80 or 90 points is allocated for price on the following basis:

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

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:

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

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmax = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:

4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—

(a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or

(b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,

then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

Table 1: Specific goals for the tender and points claimed are indicated per the table below.

(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.)

Note to tenderers: The tenderer must indicate how they claim points for each preference

point system.)

The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Women	3	6		
Youth	3	6		
People with Disabilities	2	4		
Black People	2	4		

Source Documents to be submitted with the Bid or RFQ

*CIPC Document	(Company Registration Document will be required for verification (CIPC DOC))
*Woman	(Originally Certified ID Document)
*Youth	(Originally Certified ID Document)
*People with Disability	(Letter from the Dr. Confirming the Disability)
*Black Ownership	(Originally Certified ID Document)

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:	
	
	
	

ANNEXURE 1: AUTHORITY TO SIGN THE BID DOCUMENT

AUTHORITY TO SIGN A BID

A. COMPANIES

If a Bidder is a company, a certified copy of the resolution by the board of directors, personally signed by the chairperson of the board, authorising the person who signs this bid to do so, as well as to sign any contract resulting from this bid and any other documents and correspondence in connection with this bid and/or contract on behalf of the company must be submitted with this bid, that is before the closing time and date of the bid

AUTHORITY BY BOARD OF DIRECTORS

By resolution passed by the Board of Directors on20.....

Mr/Mrs/Ms.....

...

(whose signature appears below) has been duly authorised to sign all documents in connection with this bid on behalf of

(Name of Company)

IN HIS/HER CAPACITY AS:

SIGNED ON BEHALF OF COMPANY:

.....
(PRINT NAME)

SIGNATURE OF SIGNATORY: **DATE:**

.....

WITNESSES: 1.....

2.....