



RFP NUMBER:	RFP/SASSETA/24251127/1
DESCRIPTION:	Appointment of suitably experienced and knowledgeable service provider to supply and modify a Microsoft Dynamics 365 Finance System from the date of appointment to 31 March 2030
PUBLISH DATE:	27 February 2026
CLOSING DATE:	23 March 2026
CLOSING TIME:	11h00 am
COMPULSORY BRIEFING SESSION DATE	N/A
VALIDITY PERIOD:	120 days from the closing date
PREFERENCE POINT SYSTEM	80/20
BID RESPONSES TO BE SUBMITTED ELECTRONICALLY TO EMAIL ADDRESS:	Proposals are to be submitted electronically via email to financesystem@sasseta.org.za quoting the reference (RFP/SASSETA/24251127/1)
ATTENTION:	Ms. Kholofelo Leshabane
The email address (financesystem@sasseta.org.za) is for the submission of tender proposals only and will be accessed by SASSETA after the tender closing date and time.	
Queries related to this tender are to be sent to scm02@sasseta.org.za . No later than 12h00 on 20 March 2026 .	

NB: The SASSETA logo and other intellectual property rights are owned by SASSETA and are protected by applicable intellectual property laws. Unless authorized in writing, you are prohibited from using the SASSETA logo or any of its intellectual property in any manner whatsoever. Any unauthorized use of the SASSETA Logo may result in legal action.

If you receive any suspicious calls asking for payment to secure an award of a bid or that the outcome of a tender can be influenced in your favour, please immediately inform the SASSETA Anti-Corruption Hotline at 0800 162 111 for further investigation.

DOCUMENTS IN THIS BID DOCUMENT PACK

Bidders are to ensure that they have received all pages of this document, which consist of the following documents:

SECTION A

1. RFP Submission Conditions and Instructions
2. Terms of Reference
3. Selection Process

SECTION B

1. Invitation to Quote (SBD 1)
2. Pricing Schedule (SBD 3.3)
3. Bidder's Disclosure (SBD 4)
4. Preference Points Claim form in terms of Preferential Procurement Regulations 2022 (SBD 6.1).
5. Submission Checklist
6. General Conditions of Contract (Annexure A)
7. List of all modules and functionalities (Annexure B)
8. Pricing Schedule (Annexure C)

NB.: Bidders are required to return the SASSETA attached Standard Bidding (SBD) forms and not submit SBD forms from other entities.

1. RFP SUBMISSION CONDITIONS AND INSTRUCTIONS

1.1 FRAUD AND CORRUPTION

- 1.1.1 All Service Providers are to take note of the implications of contravening the Prevention and Combating of Corrupt Activities Act, Act No 12 of 2004 and any other Act applicable.

1.2 COMPULSORY BRIEFING SESSION

- 1.2.1 There will be no compulsory briefing session for this Request for Proposal.

1.3 CLARIFICATIONS/QUERIES

- 1.3.1 Any clarification required by a bidder regarding the meaning or interpretation of the Terms of Reference, or any other aspect concerning the bid, is to be requested in writing (e-mail) from **Ms. Kholofelo Leshabana** on scm02@sassetta.org.za by **12H00** on the **13 March 2026**. The bid **number** should be mentioned in all correspondence. **Telephonic requests for clarification will not be accepted.**

1.4 SUBMITTING BIDS

- 1.4.1 Proposals to be submitted electronically only via email to:
financesystem@sassetta.org.za (maximum size of the email 30MB)
- 1.4.1.1 Bidders are advised to compress their email submission(s) to a maximum of 30MB file/folder. **Any submission(s) exceeding 30MB will be automatically rejected by the server.**
- 1.4.1.2 Submission(s) that exceed 30MB can be made through the method of We Transfer. **Bidders are advised NOT to set expiry date on the submission(s) made. If a Bidder's response is found to have expired during the evaluation period, it will be considered non-responsive.**
- 1.4.1.3 Bidders are to submit their document in the following formats "PDF, Excel, Picture format and zipped files only. Submissions made with different formats from the ones above and not supported by the SASSETA environment will be deemed non-responsive.
- 1.4.1.4 Bidders **must not submit their responses** via **Google drive** method as this option requires access via a Gmail account. If a Bidder's response is found to have been sent via Google drive during the evaluation period, it will be considered non-responsive.
- 1.4.1.5 Bidders are advised to double-check their submission(s) before responding to the bid.

1.5 Closing date and time 23 March 2026 @11h00

1.6 LATE BIDS

- 1.6.1 Bids received late shall not be considered. A bid will be considered late if it arrived only one second after 11h00 or any time thereafter. Bids arriving late will not be considered under any circumstances. Bidders are therefore strongly advised to ensure that bids be sent allowing enough time for any unforeseen events that may delay the delivery of the bid.

1.7 NEGOTIATION

1.7.1 SASSETA has the right to enter into a negotiation with a prospective service provider.

1.7.2 A contract will only be deemed to be concluded when reduced to writing in a contract form signed by the designated person responsible of both parties.

1.8 REASONS FOR REJECTION

1.8.1 SASSETA shall reject a bid for the award of a contract if the recommended bidder has committed a proven corrupt or fraudulent act in competing for the particular contract.

1.8.2 SASSETA shall disregard the bid of any bidder if that bidder, or any of its directors:

1.8.2.1 have abused the Supply Chain Management systems of SASSETA.

1.8.2.2 have committed proven fraud or any other improper conduct in relation to such systems.

1.8.2.3 have failed to perform on any contract and the proof exists.

1.8.2.4 Such actions shall be communicated to the National Treasury.

1. TERMS OF REFERENCE FOR MICROSOFT DYNAMICS 365 FINANCE SYSTEM

1.1. INTRODUCTION AND BACKGROUND

1.1.1. SASSETA is one of the twenty-one (21) Sector Education and Training Authorities (SETAs) established in terms of the Skills Development Act (Act 97 of 1998) as amended. SASSETA's license has been renewed until 31st March 2030. SASSETA is classified as a schedule 3A Public Entity in terms of the Public Finance Management Act, (Act 1 of 1999, as amended). SASSETA reports to the Department of Higher Education and Training.

1.2. PURPOSE

- 1.2.1. The purpose of this Request for Proposal (RFP) is to appoint a suitably experienced and knowledgeable service provider to supply and modify a Microsoft Dynamics 365 Finance System.
- 1.2.2. The bidder is expected to make an initial provision of 5TB of cloud storage when supplying the system.
- 1.2.3. As we implement dynamics 365 Finance, the service provider will be required to provide additional storage on need basis to ensure optimal system performance. The environments come with allocated base storage.
- 1.2.4. As the system grows, additional storage for both production and non-production environments may be required.
- 1.2.5. The service provider will be required to monitor storage consumption and notify the client if an upgrade is necessary.
- 1.2.6. The service provider will be required to encourage proper data management, including archiving and file cleanups, to optimize storage usage.
- 1.2.7. The service provider will also be required to train the users as well as provide support and maintenance including acquiring annual licenses from date of appointment until 31 March 2030.

1.3. SCOPE OF WORK AND DELIVERABLES

1.3.1. The service provider will be required to supply all modules and functionalities listed in **Annexure B**.

1.4. TIMEFRAMES FOR DELIVERY OF THE WORK

- 1.4.1. This contract will commence from the date of appointment for a period ending on 31st March 2030.
- 1.4.2. The service provider will be required to implement the project within 12 months from the date of appointment.

1.5. CONDITION OF THE BID

1.5.1. As a condition of the contract, the service provider will be required to be a direct/indirect Microsoft Cloud Solutions Provider (CSP) for the duration of this contract.

1.6. PRICING

- 1.6.1. Bidders to refer to a Standard Bidding Document (SBD3.3) to record the total cost as per **Annexure C**.
- 1.6.2. Bidders to refer to **Annexure C** for a comprehensive consideration of all the factors necessary, including rules to adhere to regarding the MS Excel pricing matrix (**Annexure C**).

1.7. SUBMISSION REQUIREMENTS

- 1.7.1. Bidders are to submit at minimum the information mentioned in the phases below:
- 1.7.2. Phase 1 – Automatic disqualification criteria
- 1.7.3. Phase 2 – Functionality evaluation criteria
- 1.7.4. Phase 3 – Due diligence evaluation criteria
- 1.7.5. Phase 4 - Pricing & Specific goals

1.8. AUTOMATIC DISQUALIFICATION CRITERIA

- 1.8.1. Bidders will be required to submit proof of liquidity (i.e., bank statement) or financial assistance letter from a National Credit Regulator (NCR) registered financial institution as follows:

- 1.8.1.1. The bank statement should reflect a closing balance of R2 000 000.00 not older than 21 days from date of closure of the RFP, or
- 1.8.1.2. The financial assistance letter should be for a minimum of R2 000 000.00 and should not be older than 21 working days from the date of closure of the RFP.

NB: Failure to submit any of the above will lead to automatic disqualification. SASSETA reserves the right to confirm the validity or authenticity prior to appointment.

- 1.8.2. Bidders must be a Microsoft Cloud Solutions Provider (CSP). Both direct and indirect CSP will be accepted. Bidders who submit an indirect CSP will be required to submit signed confirmation of the partnership with the CSP holder on the letterhead of the CSP holder.

NB: Failure to submit proof of the above will lead to automatic disqualification. SASSETA reserves the right to confirm the validity or authenticity prior to appointment.

- 1.8.3. Bidders will be required to complete the MS Excel pricing matrix provided (i.e. Annexure C).

NB: Failure to quote on all modules will lead to automatic disqualification. Zero rated modules must be supported with a separate explanatory note, otherwise the bidder will be automatically disqualified.

Any form of alteration to the pricing matrix will lead to automatic disqualification.

Failure to input your information on the provided locked Annexure C will lead to automatic disqualification.

Failure to return the RFP document with the MS Excel pricing matrix will lead to automatic disqualifications.

1.9. ACCOUNTABILITY

- 1.9.1. The service provider will report directly to the Finance Manager for the duration of the assignment.

1.10. INTELLECTUAL PROPERTY

1.10.1. The service provider will be contracting with SASSETA. All products and data of this project, in whatever format raw or analysed, will be the confidential information for utilisation by SASSETA. All information and documents, received from SASSETA or stakeholders, is to be kept confidential and may not be used or distributed in any format without the written approval of SASSETA. To this end, the service provider will be required to sign a confidentiality agreement within the Contract.

1.11. PROTECTION OF PERSONAL INFORMATION ACT

1.11.1. All Service Providers are to take note of the implications of POPIA act and any other data privacy Act applicable that SASSETA complies to. In compliance to the act, please be advised that the following are applicable to the treatment of vendor information:

1.11.1.1. All requested bid information will be solemnly utilized for the purpose of the bid evaluation processes. The vendor hereby consents the information provided as part of this bid will be utilized for supply chain processes of SASSETA and may be subject to multiple processing to enable the evaluation of this bid.

1.11.1.2. The vendor consents that the information collected will be retained for the duration of the evaluation and archived for records management purposes. The information will be disposed as per the SASSETA records management policies as prescribed by the national archives act. Furthermore, the information owner acknowledges that the information provided will be scanned into digital records which are retained on the SASSETA backup servers and that are replicated to backup media. SASSETA does confirm that the organization adopts industry best practice with regards to the safeguarding of digital records whether locally stored or retained in backup media.

1.11.1.3. SASSETA confirms that all submitted records will be retained in their original form and will not be altered with to preserve the quality and originality of information provided.

1.11.1.4. SASSETA confirms that the Information Officer is duly responsible for vendor information provided and exercises stringent measures to ensure that information is secured and solemnly utilized for the purpose of use. No vendor records will be distributed or utilized for any processes outside the current bid that the information has been requested for.

2. PROPOSED SELECTION CRITERIA

2.1. Compliance with minimum requirements

2.1.1. All bids duly lodged will be examined to determine compliance with bidding requirements and conditions.

2.2. Conditions for selection/short listing

2.2.1. All submissions will be evaluated as follows:

2.2.1.1. Phase 1 – Mandatory requirements:

- Submit their proposal by the closing date and time. **Submission after the closing date or time will lead to automatic disqualification.**
- Bidders will be required to submit proof of liquidity (i.e., bank statement) or financial assistance letter from a National Credit Regulator (NCR) registered financial institution as follows:
 - i. The bank statement should reflect a closing balance of R2 000 000.00 not older than 21 days from date of closure of the RFP, or
 - ii. The financial assistance letter should be for a minimum of R2 000 000.00 and should not be older than 21 working days from the date of closure of the RFP

Failure to submit any of the above will lead to automatic disqualification. SASSETA reserves the right to confirm the validity or authenticity prior to appointment.

- Bidders must be Microsoft Cloud Solutions Provider (CSP). Both direct and indirect CSP will be accepted. Bidders who submit an indirect CSP will be required to submit signed confirmation of the partnership with the CSP holder on the letterhead of the CSP holder.

Failure to submit proof of the above will lead to automatic disqualification. SASSETA reserves the right to confirm the validity or authenticity prior to appointment.

- Bidders will be required to complete the MS Excel pricing matrix provided (i.e. Annexure C).

Failure to quote on all modules will lead to automatic disqualification. Zero rated modules must be supported with a separate explanatory note, otherwise the bidder will be automatically disqualified.

Any form of alteration to the pricing matrix will lead to automatic disqualification.

Failure to input your information on the provided locked Annexure C will lead to automatic disqualification.

Failure to return the RFP document with the MS Excel pricing matrix will lead to automatic disqualifications.

- Complete and submit all Standard Bidding Documents (SBD) forms mentioned above on page 2 of this document, namely: SBD1, SBD 3.3, SBD 4, and SBD 6.1.
- Be registered on the National Treasury Central Supplier Database (CSD) by the closing date and time of this request for quotation. Bidders are to provide SASSETA with a copy of their CSD registration report downloaded from the National Treasury CSD Website.
- Initial each page of the General Condition of Contract (Annexure A) and submit with your proposal.

2.2.1.2. Phase 2: Functionality evaluation criteria

- Bidders who meet the requirements of the mandatory items above will be evaluated on functionality requirements.
- The proposals of all service providers will be rated on a scale of 0 to 2:
 - 0: Unacceptable, does not meet set criteria, not adequate for the stated element.
 - 1: Acceptable, does meet set criteria, is adequate for the stated element.
 - 2: Exceptional mastery of the requirement should ensure extremely effective performance.

ELEMENT	FUNCTIONALITY EVALUATION		FUNCTIONALITY WEIGHT	TOTAL SCORE
Suitability of the bidder:	Rating out of 2	Evaluation criteria		
<ul style="list-style-type: none"> • Bidders to submit a minimum of three (3) signed reference letters on a client's letterhead demonstrating experience in supply and modification of any Finance system: • At minimum, two (2) of the three (3) letters requested above should demonstrate experience in the supply and modification of an MS Dynamics 365 system. (Points 35%) 	0	Non-submission of signed letters or less than three (3) signed letters relating to supply and modification of any Finance system.	35%	
	1	A bidder submitted three (3) signed reference letters demonstrating experience in the supply and modification of any Finance system and at least two (2) of those letters demonstrate experience in the supply and modification of a MS Dynamics 365 system.		
	2	A bidder submitted four (4) or more signed letters demonstrating experience in supply and modification of any Finance system and at least three (3) of those reference letters demonstrate experience in the supply and modification of a MS Dynamics 365 system.		
Experience of the project manager	Rating out of 2	Evaluation criteria		
<ul style="list-style-type: none"> • The Project Manager demonstrates extensive knowledge and experience in managing the implementation and modification of any automated and integrated system: a. Project manager to be in possession of either PMP or Agile Project Management certification, and b. Project manager to demonstrate managing a minimum of three (3) automated and integrated assignments of which two (2) should be MS Dynamics 365 system. (Points 30%) 	0	Non-submission of Project manager's CV/CV does not demonstrate the relevant and adequate experience and non-submission of PMP or Agile certification/CV demonstrates less than three (3) automated and integrated assignments of which two (2) are MS Dynamics 365 system.	30%	
	1	<ul style="list-style-type: none"> a. Project manager in possession of either PMP or Agile Project Management certification, and b. Project manager's CV demonstrate managing a minimum of three (3) automated and integrated assignments of which two (2) are MS Dynamics 365 system. 		
	2	<ul style="list-style-type: none"> a. Project manager in possession of either PMP or Agile Project Management certification, and b. Project manager's CV demonstrate managing a minimum of four (4) automated and integrated assignments of which three (3) are MS Dynamics 365 system. 		

Bidder's demonstration on solution architect:	Rating out of 2	Evaluation criteria		
<ul style="list-style-type: none"> • The Solution Architect to demonstrate extensive knowledge and experience in managing the implementation and modification of any automated and integrated system: <ul style="list-style-type: none"> a. Solution Architect to be in possession of MB 700 certification, and b. Solution Architect to demonstrate role in a minimum of three (3) automated and integrated assignments of which two (2) should be MS Dynamics 365 system. (Points 30%) <p>MB700 = Microsoft Dynamics 365: Finance and Operations Apps Solution Architect.</p>	0	Non-submission of Solution Architect's CV or CV does not demonstrate the relevant and adequate experience and non-submission of MB700 certification. CV demonstrate less than three (3) automated and integrated assignments of which two (2) are MS Dynamics 365 system.	30%	
	1	<ul style="list-style-type: none"> a. Solution Architect to be in possession of MB 700 certification, and b. Solution architect's CV demonstrate role in a minimum of three (3) automated and integrated assignments of which two (2) are MS Dynamics 365 system. 		
	2	<ul style="list-style-type: none"> a. Solution Architect to be in possession of MB 700 certification, and b. Solution architect's CV demonstrates role in a minimum of four (4) automated and integrated assignments of which two (3) are MS Dynamics 365 system. 		
Bidder's demonstration on project management:	Rating out of 2	Evaluation criteria		
<ul style="list-style-type: none"> • A bidder to submit a project implementation plan in a form of Gantt Chart demonstrating the following considerations: <ul style="list-style-type: none"> a. Stages (i.e., initiation, planning, execution, monitoring, post review and closure) b. Time allocation in weeks c. Resource allocation 	0	Non-submission of a project implementation plan or submission of an irrelevant project implementation plan.	5%	
	1	<p>A bidder submitted a project implementation plan in a form of Gantt Chart demonstrating the following considerations:</p> <ul style="list-style-type: none"> a. Stages (i.e., initiation, planning, execution, monitoring, post review and closure) b. Time allocation in weeks c. Resource allocation 		

<ul style="list-style-type: none"> d. Risks associated with each stage e. Mitigating factors associated with each risk 	2	<p>A bidder to submit a project implementation plan in a form of Gantt Chart demonstrating the following considerations:</p> <ul style="list-style-type: none"> a. Stages (i.e., initiation, planning, execution, monitoring, post review and closure) b. Time allocation in weeks c. Resource allocation d. Risks associated with each stage e. Mitigating factors associated with each risk 		
TOTAL			100%	

N/B: Bidders need to obtain 70% for functionality for them to be evaluated further. Bidders who do not meet the required functionality threshold will be disqualified from further evaluation.

2.2.1.3. Phase 3: Due diligence evaluation criteria

- Bidders who meet the requirements of the functionality evaluation will be evaluated further on the due diligence requirements.
- The proposals of all service providers will be rated on a scale of 0 to 1:
 - 0: Unacceptable, does not meet set criteria, not adequate for the stated element.
 - 1: Exceptional mastery of the requirement should ensure extremely effective performance.

SASSETA reserves the right to select the client from any of the provided reference letters for due diligence demonstration.

Bidder's demonstration of the system:	Rating out of	Evaluation criteria		
<ul style="list-style-type: none"> • A bidder to demonstrate implemented modules and their active functionalities at one of their clients from the reference letters. 	0	A bidder could not demonstrate the system. Since appointment no modules have been implemented to demonstrate usability of the system.	100%	
	1	A bidder successfully demonstrated the system implemented at their client with active modules and functionalities.		
TOTAL			100%	

N/B: Bidders need to obtain 100% for functionality for them to be evaluated further. Bidders who do not meet the required functionality threshold will be disqualified from further evaluation.

2.2.1.4. Phase 4 – Price and Specific Goals

- The value of this bid is estimated not to exceed R50 000 000 (all applicable taxes included) and therefore the 80/20 system shall be applicable where 80 points will be allocated to price and 20 points for Specific Goals as follows:

Evaluation Criterion on Price and Specific Goals	
Relative competitiveness of proposed price	80
Specific Goals	20
TOTAL FOR PRICE AND SPECIFIC GOALS	100

2.2.1.5. ADJUDICATION OF BID

- The Bid Adjudication Committee will consider the recommendations of the Bid Evaluation Committee (BEC) and make a recommendation to the Award Authority to make the final award. The successful bidder will usually be the service provider scoring the highest number of points lower-scoring bid based on firm, verifiable and justifiable grounds, or no award at all.

PRICING SCHEDULE

(PURCHASES)

NAME OF BIDDER:	BID NO.: RFP/SASSETA/24251127/1
CLOSING TIME: 11:00	CLOSING DATE: 27 March 2026

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

ITEM NO	DESCRIPTION	BID PRICE IN RSA CURRENCY **(ALL APPLICABLE TAXES INCLUDED)
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Total costs in line with Annexure C to be indicated below

R

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

(To be signed by a duly Authorised Delegate)

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 interest 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.

Full Name	Identity Number	Name of State institution

N/B. If more space required, Service providers are to copy this table onto their letterhead and provide information as per the table above

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 consortium¹ 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.

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¹ 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 bids invited. It contains general information and serves as a claimform for preference points for specific goals.

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

1. GENERAL CONDITIONS

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

- the 80/20 system for requirements with a Rand value of up to R1 000 000 (all applicable taxes included).

1.2 To be completed by the organ of state

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

- a) The lowest acceptable quotation will be used to determine the accurate system once quotations are received.

1.3 Points for this quotation (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:

1.5 The maximum points for this quotation are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	100

1.6 Failure on the part of a bidder to submit proof or documentation required in terms of this bid to claim points for specific goals with the quotation, will be interpreted to mean that preference points for specific goals are not claimed.

1.7 The organ of state reserves the right to request a bidder, either before a quotation 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. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3. POINTS AWARDED FOR PRICE

3.1 THE 80/20 PREFERENCE POINT SYSTEMS

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

80/20

$$Ps = 80 \left(1 - \frac{Pt - Pmin}{Pmin} \right)$$

Where

- Ps = Points scored for the price of the quotation under consideration
 Pt = Price of the quotation under consideration
 Pmin = Price of lowest acceptable quotation

3.2 POINTS AWARDED FOR SPECIFIC GOALS

- a) In terms of Regulations 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 quotation.
- b) For the purposes of this quotation, the bidder 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 bid:

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

The specific goals allocated points in terms of this bid	Number of points allocated (80/20 system)	<u>Bidders to record the number of points claimed in the rows below (80/20 system) (To be completed by the bidder)</u>
At least 100% Black People Ownership	10.00	
At least 30% Black Women Ownership	5.00	
At least 30% Black youth ownership	5.00	
Total	20.00	

NB: Specific goals will not be rewarded to bidders who do not record their points in the table above

DECLARATION WITH REGARD TO COMPANY/FIRM

3.3 Name of company/firm.....

3.4 Company registration number:

3.5 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]

3.6 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 quotation, 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 1.4and 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 bidding 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 bidder 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.

<p>.....</p> <p>SIGNATURE(S) OF BIDDER(S)</p>
<p>SURNAME AND NAME:</p>
<p>DATE:</p>
<p>ADDRESS:</p> <p>.....</p> <p>.....</p>

DOCUMENTS REQUIRED FOR CLAIMING SPECIFIC GOALS

As per bullet 1.6 and 1.7 of the Preference Points Claim Form in terms of the Preferential Procurement Regulations 2022, bidders are required to submit to the SASSETA, verification document(s) in order to be allocated the specific goals claimed:

- a) An Original/Certified copy of a valid B-BBEE Certificate or Sworn Affidavit.
- b) Certified copy/ies of Identity documents of the Company Directors
- c) CSD report
- d) Shareholder Certificates

NB.: Non-submission of the documents required above will lead to specific goal points NOT being awarded.

.....
Signature

.....
Date

.....
Position

.....
Name of Bidder

(To be signed by a duly authorised Delegate. A signed Company Resolution must be submitted).

If you receive any suspicious calls asking for payment to secure an award of a bid or that the outcome of a tender can be influenced in your favour, please immediately inform the SASSETA Anti-Corruption Hotline at 0800 162 111 for further investigation.

BIDDERS ARE ENCOURAGED TO USE THE FOLLOWING CHECKLIST WHEN SUBMITTING THEIR BIDS:

NO.	DETAILS	TICK BY BIDDER
1.	Part 1: Completed and signed the invitation to bid document (SBD 1) • To be signed by a duly Authorised Delegate.	
2.	Part 2: Completed and signed pricing schedule (SBD 3.3) • To be signed by a duly Authorised Delegate	
3.	Part 3: Completed and signed the bidder's declaration (SBD 4). <i>(In case of a consortium/ joint venture, or where sub-Service providers are utilised, each party to the bid to complete and sign the declaration of interest document)</i> • To be signed by a duly Authorised Delegate	
4.	Part 4: Completed and signed the Preference Points Claim form in terms of the Preferential Procurement Regulations 2022 (SBD 6.1) To be signed by a duly Authorised Delegate.	
5.	Part 5: Submitted the General Conditions of Contract (initialled each page)	
6.	Part 6: Bidders to submit their National Treasury Central Supplier Database (CSD) registration document.	
7.	Part 7: Bidder's attached quotation on the Company letterhead inclusive of VAT and any other applicable costs in line with the SBD 3.3	
8.	Part 8: Bidders must be Microsoft Cloud Solutions Provider (CSP). Both direct and indirect CSP will be accepted. Bidders who submit an indirect CSP will be required to submit signed confirmation of the partnership with the CSP holder on the letterhead of the CSP holder.	
	Part 9: Bidders to submit a minimum of three (3) signed reference letters on a client's letterhead demonstrating experience in supply and modification of any Finance system: At minimum two (2) of the three (3) letters requested above should demonstrate experience in the supply and modification of an MS Dynamics 365 system.	
9.	Part 10: The Project Manager to demonstrate extensive knowledge and experience in managing the implementation and modification of any automated and integrated system: a. Project manager to be in possession of either PMP or Agile Project Management certification, and b. Project manager to demonstrate managing a minimum of three (3) automated and integrated assignments of which two (2) should be MS Dynamics 365 system.	
10.	Part 11: The Solution Architect to demonstrate extensive knowledge and experience in managing the implementation and modification of any automated and integrated system: c. Solution Architect to be in possession of MB 700 certification, and d. Solution Architect to demonstrate role in a minimum of three (3) automated and integrated assignments of which two (2) should be MS Dynamics 365 system. MB700 = Microsoft Dynamics 365: Finance and Operations Apps Solution Architect.	
11.	Part 12: Bidders to submit a project implementation plan in a form of Gantt Chart demonstrating the following considerations: a. Stages (i.e., initiation, planning, execution, monitoring, post review and closure) b. Time allocation in weeks c. Resource allocation d. Risks associated with each stage	

	e. Mitigating factors associated with each risk	
12.	Part 13: Bidders to submit: NB.: Non-submission of the below-mentioned documents (under 6) will lead to specific goal points NOT being awarded.	
	Valid Companies and Intellectual Property Commission (CIPC) Company registration documents	
	Certified copy of Identity document of company directors	

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