



## REQUEST FOR PROCURING OF SERVICES

RFQ NO: 090/2025/HR&OD/SURVEY/RFQ

### APPOINTMENT OF A SERVICE PROVIDER TO ADMINISTER A CUSTOMISED ORGANISATIONAL CULTURE SURVEY FOR A PERIOD OF THREE (3) MONTHS

<b>DESCRIPTION:</b> <b>(AS PER PROCUREMENT PLAN)</b>	Appointment of a service provider to administer a customised organisational culture survey including data analytics and intelligent reporting and recommendations based on outcomes for a period of three (3) months.
<b>DURATION:</b>	three (3) months.
<b>PROPOSED BID PROCESS:</b>	RFQ
<b>BRIEFING SESSION:</b>	Non-Compulsory
<b>BRIEFING SESSION DATE AND TIME:</b>	<b>27 January 2026 @ 11h00 a.m.</b>
<b>BRIEFING SESSION VENUE:</b>	Online: Microsoft Teams  Send an e-mail to <a href="mailto:tenders06@tcta.co.za">tenders06@tcta.co.za</a> to preregister and receive an invite.  Registration for the briefing session will end on <b>26 January 2026 @15h00</b>
<b>CLARIFICATION DEADLINE:</b>	28 January 2026 @ 11H00 a.m.
<b>ISSUE DATE:</b>	20 January 2026
<b>CLOSING DATE:</b>	3 February 2026 @ 11H00 a.m.
<b>BID VALIDITY PERIOD:</b>	30 days
<b>ENQUIRIES:</b>	<a href="mailto:tenders06@tcta.co.za">tenders06@tcta.co.za</a>
<b>SUBMISSION OF PROPOSALS:</b>	<a href="mailto:tenders06@tcta.co.za">tenders06@tcta.co.za</a>

## BACKGROUND

TCTA requires the services of a professional research company to design, administer and manage the organisation's culture survey. The request is for the customised survey to be administered to approximately 200 people. The design is to be completed in conjunction with OD personnel. The survey must be able to administer and retrieve submissions online. Expert data analysis using an automated system with multiple reporting required, including presentation of outcomes to EXCO, where applicable, based on outcomes.

## SCOPE OF WORK

### DETAILED DESCRIPTION OF GOODS/SERVICES

The successful bidder will be required to:

#### Digital Culture Survey Solution

##### Requirements:

- Develop a digital culture survey solution linked to the current TCTA atmosphere. This should be a complete version (+/- 100 questions) of the current baseline questionnaire currently in use by TCTA.
- The survey must be able to identify and measure the key drivers of culture within TCTA.
- The service provider must provide analysis against the previous pulse and baseline surveys conducted over last 3 years and facilitate feedback presentations to EXCO.
- The service provider must provide a close-out report (The report must contain results, value-add recommendations, impact analysis of current TCTA practices vis-à-vis best practice, analysis against the previous pulse and baseline surveys conducted over last 3 years etc.), which contains organisational and divisional breakdowns of the analysis per question, as well improvement recommendations plus implementation plans per division and at organisational level.
- Bidders are encouraged to use specialised survey software and not the generic survey software such as MS Forms, Google Forms, Survey Monkey and others which are widely available on the internet.
- The survey solution must support:
  - Proven Advanced analytics: trend analysis, benchmarking against past surveys, divisional breakdowns.
  - Proven Custom reporting: automated dashboards and exportable reports.
  - Data security & compliance: alignment with POPIA.
  - Scalability: Proven ability to handle +/- 100 questions and large respondent groups.
  - Integration: Proven ability to compare with historical datasets (past 3 years).

## COMPANY EXPERIENCE REQUIRED

The company must have completed at least a minimum of two (2) projects in conducting climate / culture/ engagement or employee opinion surveys in the last 10 years.

PERSONNEL EXPERIENCE REQUIRED	
1)	The Registered Psychometrist or Psychologist as a lead consultant must have five (5) years' experience in corporate culture, climate or employee engagement surveys with at least two (2) completed projects in the last 10 years, related to corporate culture research, survey methodology, survey implementation, and/or survey reporting.
2)	The Data Analyst as a supporting consultant must have two (2) years' experience in corporate culture, climate or employee engagement surveys with at least two (2) completed projects in the last 10 years, related to corporate culture research, survey methodology, survey implementation, and/or survey reporting.
DELIVERABLES	
<ul style="list-style-type: none"> <li>One (1) Digital culture survey</li> <li>Design, development and implementation of a digital culture survey</li> <li>Data analysis for the survey</li> <li>Power point feedback sessions to EXCO (These PowerPoint presentations become the property of TCTA) for each survey</li> <li>Close-Out report for the survey, must have organisational and divisional breakdown analysis with recommendations, as per scope of work</li> </ul>	

RETURNABLES	
MANDATORY	NON-MANDATORY
<p><b><u>COMPANY EXPERIENCE: ANNEXURE A</u></b></p> <p><b><u>COMPLETED IN FULL OR SIGNED REFERENCE LETTERS MUST BE SUBMITTED</u></b></p> <p>Bidders who fail to submit <b>Annexure A</b> fully completed or to submit signed reference letters demonstrating two projects in the last 10 years will be disqualified.</p> <p><b>No points will be allocated if ANNEXURE A is not fully completed or reference letters for a completed project.</b></p>	SARS Tax Compliance Tax Pin. Bidders to populate their Tax Compliance Status Pin on SBD 1
<p><b><u>PERSONNEL EXPERIENCE:</u></b></p> <p>1. <b><u>Psychologist/Psychometrist</u></b> : Bidders must submit a duly completed <b>Annexure B</b> for the Psychologist/Psychometrist, accompanied by valid proof of registration with the Health Professions Council of South Africa (HPCSA)</p> <p><b>Failure to submit proof of current registration with HPCSA will lead to automatic disqualification.</b></p>	CoR 14.3 - Company Registration Certificate

RETURNABLES	
MANDATORY	NON-MANDATORY
<p>2. <b><u>Data Analyst as a supporting consultant :</u></b>            Bidders must submit <b>ANNEXURE C</b> completed in full.</p> <p>Bidders who fail to submit <b>Annexure B and C</b> will be disqualified. No CV will be considered for information required by Annexure B and C</p>	
<p>3. <b><u>Fully Completed Pricing Schedule</u></b>            Bidders who fail to submit a pricing schedule will be disqualified.</p>	<p>Fully Completed and Signed SBD 4 Form            SCM Bidding Forms: SBD1, &amp; SBD 6.1</p> <p>CSD Report. Bidders may complete their supplier number on SBD 1</p> <p>Valid BBBEE Certificate issued by the Verification Agency accredited by SANAS, Valid DTIC BBBEE Certificate, Valid Sworn Affidavit for EME or QSE, Consolidated BBBEE for Joint Venture tenderers issued by a Verification Agency an accredited by SANAS. No points will be awarded if the bidders' Sworn Affidavit does not comply with the requirements outlined in ANNEXURE D.</p>

PROPOSED FUNCTIONALITY CRITERIA		
TECHNICAL EVALUATION		
Criteria	Sub Criteria	Points
Company Experience	<p>The company must have completed at least a minimum of two (2) completed projects in the last 10 years in conducting climate / engagement / employee opinion surveys. A bidder must complete Annexure A in full or submit reference letters to score points as follows:</p> <ul style="list-style-type: none"> <li>• A bidder with less than two (2) completed projects in the last 10 years, in conducting climate/ engagement/ employee opinion surveys = 0 Points</li> <li>• A bidder with at least two (2) completed projects in the last 10 years, in conducting climate / engagement / employee opinion surveys = 15 Points</li> <li>• A bidder with three (3) or more completed projects in the last 10 years, in conducting climate / engagement / employee opinion surveys = 20 Points</li> </ul> <p>NB:</p> <ul style="list-style-type: none"> <li>• No points will be allocated if ANNEXURE A is not completed in full.</li> </ul>	20

PROPOSED FUNCTIONALITY CRITERIA		
TECHNICAL EVALUATION		
Criteria	Sub Criteria	Points
	<ul style="list-style-type: none"> <li>• No points will be allocated if there are no contactable references under ANNEXURE A or reference letters for a completed project.</li> <li>• TCTA reserves the right to contact these organisations..</li> </ul>	
Personal experience of the Registered Psychologist/Psychometrist as the lead consultant.  <b>Failure to submit proof of current registration with HPCSA will lead to automatic disqualification.</b>	<p>The Registered Psychologist/Psychometrist as a lead consultant must have five (5) years' experience in corporate culture, climate or employee engagement surveys with at least a minimum of two (2) completed projects in the last 10 years related to culture research, survey methodology, survey implementation, and/or Survey reporting. <b>A bidder must complete Annexure B in full to score points as follows:</b></p> <ul style="list-style-type: none"> <li>• The Registered Psychologist / Psychometrist as a lead consultant has less than five (5) years' experience in corporate culture, climate or employee engagement surveys and/or less than two (2) completed projects in the last 10 years, related to Culture research, survey methodology, Survey implementation, and/or survey reporting = <b>0 points</b></li> <li>• The Registered Psychologist / Psychometrist as a lead consultant has five (5) years' experience in corporate culture, climate or employee engagement surveys and a minimum of two (2) completed projects in the last 10 years, related to culture research, survey methodology, survey implementation, and/or survey reporting = <b>10 points</b></li> <li>• The Registered Psychologist / Psychometrist as a lead consultant has six (6) or more years' experience in corporate culture, climate or employee engagement surveys and three (3) or more completed projects in the last 10 years, related to culture research, survey methodology, survey implementation, and/or survey reporting = <b>20 points</b></li> </ul> <p><b>NB:</b></p> <ul style="list-style-type: none"> <li>• No points will be allocated if ANNEXURE B is not completed in full.</li> <li>• No points will be allocated if there are no contactable references for each completed project, under ANNEXURE B.</li> <li>• TCTA reserves the right to contact these organisations.</li> </ul>	<b>20</b>
Personal experience of the Data Analyst as the supporting consultant	The Data Analyst as a support consultant must have two (2) years' experience in corporate culture, climate or employee engagement surveys with at least a minimum of two (2) completed projects in the last 10 years related to culture research, survey methodology, survey implementation, and/or survey reporting.	<b>5</b>

PROPOSED FUNCTIONALITY CRITERIA		
TECHNICAL EVALUATION		
Criteria	Sub Criteria	Points
	<p><b>A bidder must complete Annexure C in full to score points as follows:</b></p> <ul style="list-style-type: none"> <li>• The Data Analyst as a support consultant has less than two (2) years' experience in corporate culture, climate or employee engagement surveys and/or less than two (2) completed projects in the last 10 years related to culture research, survey methodology, survey implementation, and/or survey reporting = 0 Points</li> <li>• The Data Analyst as a support consultant has two (2) years' experience in corporate culture, climate or employee engagement survey with a minimum of two (2) completed projects in the last 10 years related to culture research, survey methodology, survey implementation, and/or survey reporting = <b>5 Points</b></li> </ul> <p>NB:</p> <ul style="list-style-type: none"> <li>• No points will be allocated if ANNEXURE C is not completed in full.</li> <li>• No points will be allocated if there are no contactable references for each completed project, under ANNEXURE C.</li> <li>• TCTA reserves the right to contact these organizations.</li> </ul>	
<b>TOTAL POINTS</b>		<b>45</b>
<b>NB - Bidders must obtain a minimum of 30 points out of 45 points to qualify for the next phase of evaluation.</b>		
Item No	Description	Points
1	<b>Available automated analytics</b>	<b>10</b>
2	<b>Available automated reports and customizability</b>	<b>5</b>
3	<b>Scalability: Ability to handle +/- 100 questions and large respondent groups</b>	<b>5</b>
4	<b>Integration: Proven ability to compare with historical datasets (past 3 years)</b>	<b>10</b>
<b>TOTAL POINTS</b>		<b>30</b>
<b>Bidders must score 30 points to proceed to the next stage of price and preference evaluation</b>		

PRICING SCHEDULE				
ITEMS	SERVICE DESCRIPTION	QUANTITY	UNIT PRICE (VAT EXCL)	TOTAL COST FOR THREE (3) MONTHS
1	Design and development of a digital culture “pulse” survey solution	1	R	R
2	Implementation and management of a	1	R	R

PRICING SCHEDULE				
ITEMS	SERVICE DESCRIPTION	QUANTITY	UNIT PRICE (VAT EXCL)	TOTAL COST FOR THREE (3) MONTHS
	digital culture "pulse" survey solution			
3	Data analysis of pulse survey	1	R	R
4	Culture survey PowerPoint feedback session to EXCO.	1	R	R
5	Culture survey close-out report with recommendations	1	R	R
<b>SUB-TOTAL</b>				
<b>VAT@15%</b>				R
<b>TOTAL Bid PRICE FOR THE PERIOD OF THREE (3) MONTHS</b>				

### PREFERENTIAL POINTS

#### Preferential Points Calculation:

The weighting of the Preferential points calculation is as follows:

Price = 80

Specific Goals = 20

Bidder's Score = 100

### TERMS AND CONDITIONS

TCTA'S Standard Conditions of Bid shall apply to this bid. TCTA reserves the right to cancel or not to award this bid in accordance with its standard Conditions of Bid. Bidders can obtain TCTA's standard conditions of bid upon request or on TCTA's website.

### ATTACHMENTS

ANNEXURE A	COMPANY EXPERIENCE
ANNEXURE B	PSYCHOLOGIST/PSYCHOMETRIS EXPERIENCE
ANNEXURE C	SUPPORTING CONSULTANT EXPERIENCE
ANNEXURE D	B-BBEE SWORN AFFIDAVIT REQUIREMENTS FOR EME AND QSE
ANNEXURE E	SBD 1 FORM
ANNEXURE F	SBD 6.1 FORM
ANNEXURE G	SBD 4 FORM

## ANNEXURE A: COMPANY EXPERIENCE

No	Client Name	Description of project/s completed within culture research, survey methodology, survey implementation, and/or survey reporting	Project Start Date (indicate date, month & year) Dd/mm/yyyy	Project End Date (indicate date, month & year) Dd/mm/yyyy	Contact Person and contact details (email address and contact number)	Reference Letters attached (yes/no)
1						
2						
3						
4						
5						

SIGNATURE: .....

NAME OF BIDDER..... (of person authorized to sign on behalf of the Bidder)

**ANNEXURE B: PERSONAL WORK EXPERIENCE OF THE REGISTERED PSYCHOLOGIST/PSYCHOMETRIST AS A LEAD CONSULTANT**

Name: \_\_\_\_\_ Number of years of experience: \_\_\_\_\_

No	Client Name	Description of project/s completed within culture research, survey methodology, survey implementation, and/or survey reporting	Project Start Date (indicate date, month & year) Dd/mm/yyyy	Project End Date (indicate date, month & year) Dd/mm/yyyy	Contact Person and contact details (email address and contact number)	Reference Letters attached (yes/no)
1						
2						
3						
4						
5						

SIGNATURE: .....

NAME OF BIDDER ..... (of person authorized to sign on behalf of the Bidder)

## ANNEXURE C: PERSONAL WORK EXPERIENCE OF THE SUPPORTING CONSULTANT

Name: \_\_\_\_\_ Number of years of experience: \_\_\_\_\_

No	Client Name	Description of project/s completed within culture research, survey methodology, survey implementation, and/or survey reporting	Project Start Date (indicate date, month & year) Dd/mm/yyyy	Project End Date (indicate date, month & year) Dd/mm/yyyy	Contact Person and contact details (email address and contact number)	Reference Letters attached (yes/no)
1						
2						
3						
4						
5						

SIGNATURE: .....

NAME OF BIDDER ..... (of person authorized to sign on behalf of the Bidder)

## **ANNEXURE D: B-BBEE SWORN AFFIDAVIT REQUIREMENTS FOR EME AND QSE**

**The following information is required for the Sworn Affidavits to be valid: -**

1. Name/s of deponent as they appear in the identity document and the identity number;
2. Designation of the deponent as either the director, owner or member must be indicated in order to know that person is duly authorised to depose of an affidavit;
3. Name of enterprise as per enterprise registration documents issued by the CIPC, where applicable, and enterprise business address.;
4. Percentage of black ownership, black female ownership and designated group. In the case of specialised enterprises as per Statement 004, the percentage of black beneficiaries must be reflected;
5. Indicate total revenue for the latest financial year and whether it is based on audited financial statements or management accounts;
6. Full financial year end as per the enterprise's registration documents, which was used to determine the total revenue. Example 28 February 2022;
7. B-BBEE Status level. An enterprise can only have one status level;
8. Nature of business;
9. VAT Number;
10. Date deponent signed and date of Commissioner of Oath must be the same;
11. Commissioner of Oath cannot be an employee or ex officio of the enterprise because, a person cannot by law, commission a sworn affidavit in which they have an interest;
12. Correct Sector Codes Affidavit to be used

## ANNEXURE E

## SBD 1

PART A  
INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)					
BID NUMBER:		CLOSING DATE:		CLOSING TIME:	11h00am
DESCRIPTION					
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
<a href="mailto:tenders06@tcta.co.za">tenders06@tcta.co.za</a>					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Tefo		CONTACT PERSON	Shaun	
TELEPHONE NUMBER	N/A		TELEPHONE NUMBER	N/A	
FACSIMILE NUMBER	N/A		FACSIMILE NUMBER	N/A	
E-MAIL ADDRESS	<a href="mailto:tenders06@tcta.co.za">tenders06@tcta.co.za</a>		E-MAIL ADDRESS	<a href="mailto:tenders06@tcta.co.za">tenders06@tcta.co.za</a>	
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:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
1. ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		2. ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]	
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS					
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?					
<input type="checkbox"/> NO <input type="checkbox"/> YES					
DOES THE ENTITY HAVE A BRANCH IN THE RSA?					
<input type="checkbox"/> NO <input type="checkbox"/> YES					
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?					
<input type="checkbox"/> YES <input type="checkbox"/> NO					
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?					
<input type="checkbox"/> YES <input type="checkbox"/> NO					

IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?

YES

NO

**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.**

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

### **3. 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, 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).**

### **4. 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](http://WWW.SARS.GOV.ZA).
- 2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
- 2.5 IN BIDS WHERE CONSORCIA / 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: .....

## 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<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

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:

.....  
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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.

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<sup>2</sup> 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.
- 3.4 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.
- 3.5 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.
- 3.6 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

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<sup>2</sup> 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**

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**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);
- 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.
- 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:

	<b>POINTS</b>
<b>PRICE</b>	<b>80</b>
<b>SPECIFIC GOALS</b>	<b>20</b>
<b>Total points for Price and SPECIFIC GOALS</b>	<b>100</b>

- 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:

80/20

or

90/10

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

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:

$80/20$	<b>or</b>	$90/10$
$Ps = 80 \left( 1 + \frac{Pt - P_{max}}{P_{max}} \right)$ or		$Ps = 90 \left( 1 + \frac{Pt - P_{max}}{P_{max}} \right)$

Where

$Ps$  = Points scored for price of tender under consideration

$Pt$  = Price of tender under consideration

$P_{max}$  = 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 (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
BBBEE-LEVEL		
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 property
- 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:** .....

