

## REQUEST FOR QUOTATION

RFQ 005-2022-23  
Enquiries: Vusimuzi Jangaza  
Tel: 012 315 5280  
Email: [rfp@gtac.gov.za](mailto:rfp@gtac.gov.za)

### ATTENTION: PROSPECTIVE BIDDERS

### RFQ 005-2022-23: APPOINTMENT OF THE SERVICE PROVIDER TO CONDUCT A LIFESTYLE AUDIT TO ALL SMS MEMBERS OF THE GOVERNMENT TECHNICAL ADVISORY CENTRE (GTAC) FOR A PERIOD OF FIVE (5) MONTHS

The Government Technical Advisory Centre (GTAC) hereby invites credible suppliers to submit a quotation in response to the Terms of Reference attached hereto.

#### 1. EVALUATION METHODOLOGY

1.1. The table below reflects the evaluation methodology for this Request for Quotation:

Evaluation Stage	Description
Administrative Compliance	Evaluation of documents cited in section 2 below. Documents must be submitted and duly completed and signed where required.
Technical Evaluation	Refer to the Terms of Reference (TOR).
Price and B-BBEE	Refer to section 4 below. Valid B-BBEE certificate/Affidavit and duly completed and signed SBD 6.1 and SBD 3.3 required.

#### 2. ADMINISTRATIVE COMPLIANCE

2.1. The following documents must be submitted for administrative compliance evaluation. Documents must be duly completed and signed (where applicable).

- a) SBD 1
- b) SBD 4
- c) SBD 6.1



## REQUEST FOR QUOTATION

- d) B-BBEE Certificate/sworn Affidavit
- e) SBD 3.3
- f) CSD registration report/MAA number
- g) Technical response (Response to technical evaluation criteria cited in the TOR)

### 3. TECHNICAL EVALUATION (REFER TO THE TOR)

- 3.1. Bidders are required to submit a technical proposal in response to the technical evaluation criteria cited in the Terms of Reference.
- 3.2. Bidders are required to meet the minimum technical threshold to progress to price and B-BBEE evaluation.

### 4. PRICE AND B-BBEE EVALUATION BASED ON THE PPPFA (REFER TO THE SBD 6.1 FOR MORE DETAIL)

#### 4.1. 80/20 Preference Points Evaluation

- a. In terms of regulation 5 of the Preferential Procurement Regulations pertaining to the Preferential Procurement Policy Framework Act, 2000 (Act 5 of 2000), responsive bids with a Rand value up to R50 million will be adjudicated by the State on the 80/20-preference point for Broad-Based Black economic empowerment in terms of which points are awarded to bidders on the basis of:
  - The bid price (maximum 80 points)
  - Broad-based black Economic Empowerment as well as specific goals (maximum 20 points)

### 5. CONDITIONS

#### 5.1. The following conditions will apply:

- a. Price quotation must be provided separately on the SBD 3.3 provided. If bidders use additional template to the SBD 3.3 and there is an inconsistency, GTAC reserves the right to use the price that is on the SBD3.3.
- b. Price(s) quoted must be valid for sixty (60) days from date of offer.
- c. Total cost must be inclusive of all applicable taxes (if no indication is given, quoted prices will be evaluated as all inclusive).



## REQUEST FOR QUOTATION

- d. Price (s) quoted must be within the RFQ threshold of R1 000 000.00 to be compliant and valid.
- e. Late or incomplete submissions will not be accepted. Failure to comply with these conditions will invalidate your offer.

5.2. The following attachments must be submitted with the quotation:

- a. Standard Bidding Document (SBD) forms: (SBD 1, SBD 3.3, SBD 4, SBD 6.1).  
**NB: Bidders will be disqualified if any of the SBD forms are not submitted or are found not to be true and complete in every respect.**
- b. CSD registration report/number; and
- c. Valid B-BBEE Certificate/sworn affidavit if applicable.
- d. Duly signed partnership agreement clearly stating the roles in a case of a partnership formed for this bid (i.e., consortium or joint venture).
- e. Bidders in a consortium/joint venture/sub-contracting must submit a registration report/number from the Central Supplier Database (CSD) for all parties with this bid.

## 6. SUBMISSION DETAILS AND CLARIFICATION

Submissions must be sent to: [rfp@gtac.gov.za](mailto:rfp@gtac.gov.za) by 14:00 on 30 September 2022.

GTAC will evaluate submissions in accordance with the evaluation methodology cited above but is neither legally bound nor obligated to accept quoted rates and further reserves the right to negotiate professional rates around any quotation before the award of this RFQ.

Any clarification regarding this invitation or the Terms of Reference must be addressed to the aforementioned email address.

Yours sincerely



**Thando Nyoka**  
Professional Services Procurement  
Date: 20 September 2022



## TERMS OF REFERENCE

### APPOINTMENT OF THE SERVICE PROVIDER TO CONDUCT A LIFESTYLE AUDIT TO ALL SMS MEMBERS OF THE GOVERNMENT TECHNICAL ADVISORY CENTRE (GTAC) FOR A PERIOD OF FIVE (5) MONTHS

#### Project Identification

<b>Name of Client</b>	Human Capital Management & Corporate Services Unit
<b>Contracting Authority</b>	Government Technical Advisory Centre (GTAC)
<b>Accountable Officer</b>	Acting Director: Human Capital Management
<b>Project Purpose</b>	To conduct a Lifestyle audit

## 1. PURPOSE

- 1.1 To appoint a suitably qualified and experienced independent service provider that can support the GTAC in conducting lifestyle audit to all SMS members for a period of five (5) months.

## 2. BACKGROUND

- 2.1 GTAC is embarking on a Lifestyle Audit of all SMS members, as mandated by Regulation 22 of the Public Service Regulations, 2016 (PSR, 2016)
- 2.2 The GTAC has identified the need to procure the service of a suitably qualified and experienced independent service provider to conduct comprehensive lifestyle audits and analysis of business interest of the SMS members and their spouses/life partners.

## 3. PRICING AND DISBURSEMENTS

- 3.1 Prospective service providers will be required to provide a VAT inclusive fixed bid price (with a detailed costing), which must outline the time and costs related to the conducting of lifestyle audits.
- 3.2 The total number of individuals who will be subjected to the lifestyle audit is still to be determined and the proposal must be based on the lifestyle audit of **ONE** individual SMS member.
- 3.3 This price will then be applied/multiplied by GTAC over the number of individuals lifestyle audits to be performed.
- 3.4 The total cost per individual lifestyle audit should not exceed R22500, inclusive of VAT.
- If the bidders are equal in terms of pricing, the recommendation will be based on the highest points of the functionality evaluation
  - If the bidders are equal in terms of pricing and functionality, the recommendation will be based on the drawing of lots
  - GTAC reserves the right to negotiate on price with the recommended bidder
- 3.5 For the purpose of this tender the period for completion for the lifestyle audit of the SMS members and their spouse/life partner is 5 months ( estimated timeframe from October 2022 to March 2023) and the proposal must be based on this period.
- 3.6 The proposal will exclude subsistence and travel cost that will be required to perform the audit and will be limited to 400 km for a return trip (to and from the destination). This will be approved by GTAC in accordance with the Cost Containment Instructions and be as agreed to and on an as and when required basis should a need arise.

#### 4. SCOPE OF WORK AND DELIVERABLES

- 4.1 The service provider will be required to use a comprehensive approach for the lifestyle audits including assembling the financial and behavioural profile as well as performing the net-worth, expenditure and bank deposit analysis methods of each individual as per the Association of Certified Fraud Examiner Guidelines. The service provider must indicate in their proposal/bid document that their methodology complies with this approach.
- 4.2 The lifestyle audit should as a minimum include the management of the submission and analysis of a comprehensive questionnaire, possible interviews and the verification thereof from relevant sources (e.g banking records, declarations etc.) of the following: Total income or sources of funds of the individual for the period referred to in paragraph 3 (including salaries, investment income, gifts, sale of assets, insurance proceeds, inheritance, commissions, awards including comparison to bank statements, etc.);
- 4.2.1 Large and/or significant income and expenditure transactions and the funding thereof;
  - 4.2.2 Business interests, directorships and resultant dividends/profit distribution or any other related income;
  - 4.2.3 Personal investments and resultant interest – including shares and bonds;
  - 4.2.4 Assets of the individual (including property, vehicles, collectibles, bank accounts, jewellery, cash on hand, etc.);
  - 4.2.5 Liabilities of the individual (loans, credit cards, mortgages, notarial bonds, etc.);
  - 4.2.6 Declarations of any transfer of assets to family members, trusts, friends, etc.;
  - 4.2.7 Perform credit searches;
  - 4.2.8 Review of income tax compliance and disclosure;
  - 4.2.9 Review foreign travel, hospitality and other benefits of a material nature;
  - 4.2.10 Criminal background check (through SAPS Criminal Record Centre [CRC], and only with the subject's consent);
  - 4.2.11 General pre-qualification criteria set by GTAC, have been met; and
  - 4.2.12 Any other reviews as required to finalise the lifestyle audit including a review of publicly available information pertaining to immediately family members.
- 4.3 The lifestyle audit to be conducted taking into account the legislative framework included but not limited to the other legislation such as POPI Act or any legal/compliance requirements as applicable to individuals subjected to lifestyle audits.
- 4.4 The lifestyle audit must include interviews to be conducted with the relevant individuals to provide clarity or any information that is required during the audit.
- 4.5 Utmost care must be exercised during the lifestyle audits to:
- 4.5.1 Obtain evidence in a lawful manner;
  - 4.5.2 Ensure the integrity of data collected;
  - 4.5.3 Maintain confidentiality of all information; and
  - 4.5.4 Ensure that the rights of the relevant persons are not infringed upon.
- 4.6 The results/outcomes of the audit must explicitly indicate:
- 4.6.1 Whether the lifestyle of the member of the SMS and his/her spouse or life partner or official (as determined for that assignment) is commensurate with his/her income and flag any inconsistencies thereto;

4.6.2 Whether the members of the SMS and his/her spouse or life partner or official (as determined for that assignment) received any income other than the individual's salary and whether any income could cause a possible conflict in the role of the SMS members or the performance of his/her duties;

4.6.3 Whether any interest held by the SMS member and his/her spouse or life partner or official (as applicable) represents a potential conflict or may interfere with the duties as an SMS member in the performance of his/her duties.

4.6.4 Where applicable that such sources of income has been declared/approved as required; and

4.6.5 Any other matter relevant to the objective of the lifestyle audit performed.

4.7 The data obtained and all working papers generated during the audit of the SMS member and his/her life partner should be handed over to the Acting Head: GTAC for safekeeping (Both hard copy and electronic versions).

## **5. INDEPENDENCE AND OBJECTIVITY OF THE SERVICE PROVIDER**

5.1 All lifestyle audit need to be treated as confidential and in line with the Association of Certified Fraud Examiners (ACFE) and Institute of Commercial Forensic Practitioners (ICFP) code of Ethics and Professional Standards.

5.2 In carrying out the work, the service provider must ensure that their staff maintains their objectivity and independence.

5.3 The service provider shall;

5.3.1 Have no executive or managerial powers or functions;

5.3.2 Not be involved in the day to day operations of the GTAC or have any relationship with any staff member of GTAC;

5.3.3 Not be responsible for the detailed development or implementation of new systems and procedures;

5.3.4 Report to the Acting Head of GTAC in respect to the lifestyle audit of SMS members; and

5.3.5 Human Capital Management and Corporate Service Unit will project manage the project.

## **6. CONTINUITY AND PROFILE OF STAFF ON THE PROJECT**

6.1 The bidders must ensure the presence of the resources available throughout the duration of the contract, unless agreed otherwise with the GTAC.

6.2 Replacement of any of the proposed team members or managers must be of equal qualification, experience and professional membership as the originally appointed team members/manager and such information must be approved by the designated GTAC official before implementation.

## **7. MANDATORY BID DOCUMENTS**

7.1 This entails initial screening of bid response received at close of bid. During this phase bid responses are registered to ascertain the number of bid responses received before the closing date and time and to verify if the bidders submitted all mandatory requirements.

7.2 All the below mentioned SBD documents must be completed and signed by the duly authorised representative of the prospective bidder.

Checklist	Tick Yes / No
All SBD Documents must be submitted & signed	
Proof of Central Supplier Database detailed summary report	
SBD 1 – Invitation to Bid	
SBD 4 – Declaration of interest	
SBD 6.1 – Preference points claim form in terms of Preferential Procurement Regulations 2017	
SBD 3.3 - proposal document as illustrated in the bid document	
Valid Original or certified copy B-BBEE certificate or exemption affidavit.	
Certified copies of identify documents of the Directors or Members. The certification must not be older than six months	

**NB: FAILURE TO PROVIDE ALL COMPLETED AND SIGNED STANDARD BIDDING DOCUMENTS (SBD) WILL RENDER THE BID INVALID.**

**In case of Joint Ventures, Trusts or Consortiums all of the following will apply:**

- A copy of a Joint Agreement signed by all parties must be attached;
- Consolidated B-BBEE Status Level Verification Certificate must be attached;
- A separate Tax Clearance Certificate or PIN, or CSD Summary report for each supplier; and
- Joint Banking Account details must be submitted. In the absence of a joint venture bank account, a written agreement between all the parties involved stipulating the designated bank account into which payment must be submitted.

## 8. EVALUATION CRITERIA

8.1 The Department has set minimum standards that a bidder needs to meet in order to be evaluated and selected as a successful bidder. The evaluation will be carried out in the following phases:

Administrative / Legal Requirements	Functionality Evaluation Criteria	Price
Bidders must submit all documents as outlined in paragraph 7.2 and 10 of the bid document. Only bidders that comply with all these criteria will proceed to Phase 1	Bidder(s) are required to achieve a minimum threshold of 70 out of 100 points to qualify for further evaluation on pricing and BBBEE	Allocation of points for price (80) and BBBEE contribution level status (20) shall be done in accordance with the applicable provisions of the Preferential Procurement Policy Framework Act, 2000 (Act 5 of 2000), read with the Preferential Procurement Regulations, 2017.



## 8.2 Phase 1: Functionality Criteria

The table below indicates the criteria which the service provider is expected to demonstrate and which will form the evaluation criteria during the evaluation of the prospective service providers proposals.

The following weighting system will apply and only bidders scoring a minimum of 70 points or more will be evaluated further on pricing and B-BBEE.

A	<b>Company Experience</b>  Contactable references with contact numbers and email addresses where lifestyle audits of similar extent, scope and at the same or similar organisational /enterprise level were conducted in the past 5 calendar years. <ul style="list-style-type: none"> <li>The bidder is required to provide contactable client references which allow for its services to be verified in line with extent, scope, organisational level and years of experience</li> <li>The reference letters must demonstrate the services and the period in which the service was done.</li> <li>References should be presented in a form of a written letter on an official letterhead where services have been provided</li> </ul>	5 = 5 or more contactable references 4 = 4 contactable references 3 = 3 contactable references 2 = 2 contactable references 1 = 1 contactable reference 0 = No contactable references	20%
B	<b>Team Leader Experience</b>  Due to level of persons subjected to the lifestyle audit the audit team must include a company official at executive management level in their team, who is professionally registered and has experience in Lifestyle Audits.  The proposal must indicate the following in respect of the identified Executive Project Leader: <ul style="list-style-type: none"> <li>The number of Lifestyle Audits participated in the past five years</li> <li>Confirmation of the details of the Executive level held within the company (director/associate/director/partner etc)</li> </ul>	5 = Company Executive, 5 or more LA in five years 4 = Company Executive, 4 LA in five years 3 = Company Executive, 3 LA in five years 2 = Company Executive, 2 LA in five years 1 = Company Executive, 1 LA in five years 0 = Non-Company Executive and/or 0 LA in five years	20%
C	<b>Team Leader Qualifications</b>  Due to level of persons subjected to the lifestyle audit the audit team must include a company official at executive management level in their team, who has qualifications aligned to conducting Lifestyle Audits.  The proposal must indicate the following in respect of the identified Executive Project Leader: <ul style="list-style-type: none"> <li>An appropriate Audit or Investigation relevant tertiary qualification.</li> </ul> A score of zero for International qualification without SAQA accreditation and for no proof of qualification	5 = Masters (NQF 9) or Doctorate 4 = Honours (NQF 8) 3 = Bachelor's degree (NQF 7) 2 = National Diploma (NQF 6) 1 = NQF 5 or lower 0 = No qualification	20%

D	<p><b>Team experience</b></p> <p>Each team member must have appropriate Audit or Investigation relevant experience.</p> <p>The proposal must list the following in respect of each identified Team Member:</p> <ul style="list-style-type: none"> <li>Years experience in conducting Lifestyle Audits</li> </ul> <p>GTAC will conduct random checks against these years of experience</p>	<p>5 = Average years' experience equaling 5 years</p> <p>4 = Average years' experience equaling 4 years</p> <p>3 = Average years' experience equaling 3 years</p> <p>2 = Average years' experience equaling 2 years</p> <p>1 = Average years' experience equaling 1 years</p> <p>0 = Members do not have any years of experience</p>	10%
E	<p><b>Team qualification</b></p> <p>Each team member must have an appropriate Audit or Investigation relevant tertiary qualification.</p> <p>The proposal must list the following in respect of each identified Team Member:</p> <ul style="list-style-type: none"> <li>Appropriate necessary qualifications to conduct Lifestyle Audits</li> </ul> <p>GTAC will conduct random checks against these qualifications.</p> <p>A score of zero for International qualification without SAQA accreditation and for no proof of qualification</p>	<p>5 = Majority Masters (NQF 9) or Doctorate</p> <p>4 = Majority Honours (NQF 8)</p> <p>3 = Majority Bachelor's degree (NQF 7)</p> <p>2 = Majority National Diploma (NQF 6)</p> <p>1 = Majority NQF 5 or lower</p> <p>0 = No qualification</p>	10%
F	<p><b>Project Plan &amp; Methodology:</b></p> <p>Provide a <u>detailed project methodology</u> that encompasses the minimum aspects of the lifestyle audits as contained in paragraph 4 of the TOR including the <u>expected estimated turnaround</u> times and <u>quality assurance processes</u>.</p>	<p>5 = Proposal to complete within two months earlier than timeframe and covers <u>detailed project methodology</u> that encompasses the minimum aspects of the lifestyle audits</p> <p>4 = Proposal to complete within 1 month earlier than timeframe and covers <u>detailed project methodology</u> that encompasses the minimum aspects of the lifestyle audits</p> <p>3 = Proposal to complete within timeframe and covers <u>detailed project methodology</u> that encompasses the minimum aspects of the lifestyle audits</p> <p>2 = Proposal to complete within two weeks later than timeframe and covers <u>detailed project methodology</u> that encompasses the minimum aspects of the lifestyle audits</p> <p>1 = Proposal to complete within 1 month later than timeframe and covers <u>detailed project methodology</u> that encompasses the minimum aspects of the lifestyle audits</p> <p>0 = Proposal to complete more than 1 month outside of timeframe</p>	20%
Total Points			100%
Minimum Threshold			70%

### 8.3 Price and B-BBEE

Service provider will be expected to achieve a minimum score of 70% for functionality, in order to qualify for further evaluation in terms of Price and B-BBEE.

Proposals are requested from strong result-orientated service providers, who have the capability and capacity to conduct phased lifestyle audits for 44 SMS members GTAC employees over a period of five (5) months.

Allocation of points for price and B-BEE contribution level status shall be done in accordance with the applicable provisions of the Preferential Procurement Policy Framework Act, 2000 (Act 5 of 2000), read with the Preferential Procurement Regulations, 2017.

PRICE AND B-BBEE STATUS LEVEL CONTRIBUTION	POINTS
Price (Refer to paragraph 3)	80
BBBEE Status Level of Contribution	20
<b>TOTAL</b>	<b>100</b>

## 9. TENDER VALIDITY PERIOD

9.1 The bid will be valid for a period of sixty (60) days.

## 10. BID SUBMISSION REQUIREMENTS

Bidders should ensure that the following submission requirements are included in their bids:

- a) Duly completed and signed Standard Bidding Documents (SBD 1, 4, and 6.1), bidders are to make sure that they fully complete the SBDs. Bidders will be disqualified if any of the SBD's are found not to be true and complete in every respect.
- b) Central Supplier Database (CSD) summary registration report/number.
- c) Bidder's tax matters must be compliant at the time of award.
- d) Non-submission of qualifications will lead to a score of zero for the qualification's criterion.
- e) GTAC reserves the right to request receipt of certified copies of qualifications after the closing date of the bid.
- f) Detailed CVs of all team members indicating their qualifications, experience in conducting lifestyle audits and professional association. Failure to submit the detailed CV in the prescribed format, will result in the bid being considered non responsive.
- g) Certified copies of qualifications of all team members not older than six (6) months.
- h) Certified copies (not older than 6 months) of the following professional designation (CFE or FP(SA) or a membership letter from the association not older than 3 months confirming membership status and good standing.
- i) International qualifications must be accompanied by SAQA confirmation of accreditation. Non-submission of SAQA confirmation will lead to a score of zero for the qualifications criterion.
- j) Use of tippex and pencil in the bid document are not allowed. Where cancellation has been made, bidders should endorse with signatures.
- k) Conditions of contract template must be completed and submitted

- l) Failure to adhere to the above requirements i.e. misrepresentation and/or non-submission of the required documentation may lead to a disqualification or termination of the contract with the appointed service provider at any stage of the implementation.

## **11. DURATION OF CONTRACT**

- 11.1 The duration of this tender will be for a period of five (5) calendar months.  
11.2 Upon appointment the successful bidder will be required to enter into a Service Level Agreement.

## **12. CONDITIONS OF BID**

- 12.1 Successful bidders must be in a position to commence work within five (5) calendar days of the awarding of an assignment contract.  
12.2 General Conditions of Contract (GCC) are also applicable to this tender.

## **13. CANCELLATION**

- 13.1 On termination of the contract for whatever reason, the service provider shall on demand deliver, without the right to retention all documents and information gained in terms of this agreement.

## **14. PAYMENT**

- 14.1 GTAC will carry costs of the project.  
14.2 Payment will be made on achievement of specific project milestones in line with the approved project plan.  
14.3 All invoices must be supported by a detailed breakdown of activities completed, hours related to the activities as well as a breakdown for disbursement claimed.  
14.4 No payment will be made by GTAC where there is outstanding information not submitted by the bidder.

## PART A INVITATION TO BID

<b>YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)</b>					
BID NUMBER:	RFQ 005-2022-23	CLOSING DATE:	30 SEPTEMBER 2022	CLOSING TIME:	14:00 PM
DESCRIPTION	APPOINTMENT OF THE SERVICE PROVIDER TO CONDUCT A LIFESTYLE AUDIT TO ALL SMS MEMBERS OF THE GOVERNMENT TECHNICAL ADVISORY CENTRE (GTAC) FOR A PERIOD OF FIVE (5) MONTHS				
<b>THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM.</b>					
<b>SUPPLIER INFORMATION</b>					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
		TCS PIN:		OR	CSD No:
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE [TICK APPLICABLE BOX]		<input type="checkbox"/> Yes		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	
		<input type="checkbox"/> No			
IF YES, WHO WAS THE CERTIFICATE ISSUED BY?					
AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA) AND NAME THE APPLICABLE IN THE TICK BOX		<input type="checkbox"/> AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA)			
		<input type="checkbox"/> A VERIFICATION AGENCY ACCREDITED BY THE SOUTH AFRICAN ACCREDITATION SYSTEM (SANAS)			
		<input type="checkbox"/> A REGISTERED AUDITOR			
		NAME:			
<b>[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/SWORN AFFIDAVIT (FOR EMEs&amp; QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]</b>					
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?		<input type="checkbox"/> Yes <input type="checkbox"/> No  [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	
				<input type="checkbox"/> Yes <input type="checkbox"/> No  [IF YES ANSWER PART B:3 BELOW]	
SIGNATURE OF BIDDER		.....		DATE	
CAPACITY UNDER WHICH THIS BID IS SIGNED (Attach proof of authority to sign this bid; e.g. resolution of directors, etc.)					
TOTAL NUMBER OF ITEMS OFFERED				TOTAL BID PRICE (ALL INCLUSIVE)	
<b>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO:</b>			<b>TECHNICAL INFORMATION MAY BE DIRECTED TO:</b>		
DEPARTMENT/ PUBLIC ENTITY	GTAC		CONTACT PERSON	Vusimuzi Jangaza	
CONTACT PERSON	Vusimuzi Jangaza		TELEPHONE NUMBER	0123155516	
TELEPHONE NUMBER	0123155516		FACSIMILE NUMBER	-	
FACSIMILE NUMBER	-		E-MAIL ADDRESS	rfp@gtac.gov.za	
E-MAIL ADDRESS	rfp@gtac.gov.za				

## PART B TERMS AND CONDITIONS FOR BIDDING

<b>1. BID SUBMISSION:</b>								
<p>1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.</p> <p>1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR ONLINE</p> <p>1.3. BIDDERS MUST REGISTER ON THE CENTRAL SUPPLIER DATABASE (CSD) TO UPLOAD MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS; AND BANKING INFORMATION FOR VERIFICATION PURPOSES). B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.</p> <p>1.4. WHERE A BIDDER IS NOT REGISTERED ON THE CSD, MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS MAY NOT BE SUBMITTED WITH THE BID DOCUMENTATION. B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.</p> <p>1.5. 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 LEGISLATION OR SPECIAL CONDITIONS OF CONTRACT.</p>								
<b>2. TAX COMPLIANCE REQUIREMENTS</b>								
<p>2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.</p> <p>2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.</p> <p>2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE WWW.SARS.GOV.ZA.</p> <p>2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS TOGETHER WITH THE BID.</p> <p>2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE PROOF OF TCS / PIN / CSD NUMBER.</p> <p>2.6 WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.</p>								
<b>3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS</b>								
<table style="width: 100%; border: none;"> <tr> <td style="width: 70%;">3.1. IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?</td> <td style="text-align: right;"><input type="checkbox"/> YES <input type="checkbox"/> NO</td> </tr> <tr> <td>3.2. DOES THE BIDDER HAVE A BRANCH IN THE RSA?</td> <td style="text-align: right;"><input type="checkbox"/> YES <input type="checkbox"/> NO</td> </tr> <tr> <td>3.3. DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA?</td> <td style="text-align: right;"><input type="checkbox"/> YES <input type="checkbox"/> NO</td> </tr> <tr> <td>3.4. DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA?</td> <td style="text-align: right;"><input type="checkbox"/> YES <input type="checkbox"/> NO</td> </tr> </table> <p>IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN, IT IS NOT A REQUIREMENT TO OBTAIN A TAX COMPLIANCE STATUS / TAX COMPLIANCE SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 ABOVE.</p>	3.1. IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?	<input type="checkbox"/> YES <input type="checkbox"/> NO	3.2. DOES THE BIDDER HAVE A BRANCH IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO	3.3. DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO	3.4. DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
3.1. IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?	<input type="checkbox"/> YES <input type="checkbox"/> NO							
3.2. DOES THE BIDDER HAVE A BRANCH IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO							
3.3. DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO							
3.4. DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO							

**NB: FAILURE TO PROVIDE ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.**

## 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

---

<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.

with any person who is employed by the procuring institution? **YES/NO**

2.2.1 If so, furnish particulars:

.....  
 .....

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

2.3.1 If so, furnish particulars:

.....  
 .....

### **3 DECLARATION**

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

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium<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

---

<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.



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

## PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2017

This preference form must form part of all bids invited. It contains general information and serves as a claim form for preference points for Broad-Based Black Economic Empowerment (B-BBEE) Status Level of Contribution

**NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF B-BBEE, AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017.**

### 1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to all bids:

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

1.2

- a) The value of this bid is estimated to **not exceed** R50 000 000 (all applicable taxes included) and therefore the 80/20 preference point system shall be applicable.

1.3 Points for this bid shall be awarded for:

- (a) Price; and
- (b) B-BBEE Status Level of Contributor.

1.4 The maximum points for this bid are allocated as follows:

	POINTS
<b>PRICE</b>	<b>80</b>
<b>B-BBEE STATUS LEVEL OF CONTRIBUTOR</b>	<b>20</b>
<b>Total points for Price and B-BBEE must not exceed</b>	<b>100</b>

1.5 Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.

1.6 The purchaser reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the purchaser.

### 2. DEFINITIONS

- (a) **“B-BBEE”** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- (b) **“B-BBEE status level of contributor”** means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- (c) **“bid”** means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of goods or services, through price

quotations, advertised competitive bidding processes or proposals;

- (d) **“Broad-Based Black Economic Empowerment Act”** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- (e) **“EME”** means an Exempted Micro Enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (f) **“functionality”** means the ability of a tenderer to provide goods or services in accordance with specifications as set out in the tender documents.
- (g) **“prices”** includes all applicable taxes less all unconditional discounts;
- (h) **“proof of B-BBEE status level of contributor”** means:
  - 1) B-BBEE Status level certificate issued by an authorized body or person;
  - 2) A sworn affidavit as prescribed by the B-BBEE Codes of Good Practice;
  - 3) Any other requirement prescribed in terms of the B-BBEE Act;
- (i) **“QSE”** means a qualifying small business enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (j) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

### 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**

$$P_s = 80 \left( 1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

Where

- $P_s$  = Points scored for price of bid under consideration
- $P_t$  = Price of bid under consideration
- $P_{\min}$  = Price of lowest acceptable bid

### 4. POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR

- 4.1 In terms of Regulation 6 (2) and 7 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

B-BBEE Status Level of Contributor	Number of points (80/20 system)
1	20
2	18
3	14
4	12
5	8
6	6

7	4
8	2
Non-compliant contributor	0

## 5. BID DECLARATION

- 5.1 Bidders who claim points in respect of B-BBEE Status Level of Contribution must complete the following:

## 6. B-BBEE STATUS LEVEL OF CONTRIBUTOR CLAIMED IN TERMS OF PARAGRAPHS 1.4 AND 4.1

- 6.1 B-BBEE Status Level of Contributor: = .....(maximum of 20 points)  
(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 4.1 and must be substantiated by relevant proof of B-BBEE status level of contributor.

## 7. SUB-CONTRACTING

- 7.1 Will any portion of the contract be sub-contracted?

(*Tick applicable box*)

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
-----	--------------------------	----	--------------------------

- 7.1.1 If yes, indicate:

- i) What percentage of the contract will be subcontracted.....%  
 ii) The name of the sub-contractor.....  
 iii) The B-BBEE status level of the sub-contractor.....  
 iv) Whether the sub-contractor is an EME or QSE

(*Tick applicable box*)

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
-----	--------------------------	----	--------------------------

- v) Specify, by ticking the appropriate box, if subcontracting with an enterprise in terms of Preferential Procurement Regulations, 2017:

Designated Group: An EME or QSE which is at last 51% owned by:	EME √	QSE √
Black people		
Black people who are youth		
Black people who are women		
Black people with disabilities		
Black people living in rural or underdeveloped areas or townships		
Cooperative owned by black people		
Black people who are military veterans		
<b>OR</b>		
Any EME		
Any QSE		

## 8. DECLARATION WITH REGARD TO COMPANY/FIRM

- 8.1 Name of company/firm:.....

- 8.2 VAT registration number:.....

- 8.3 Company registration  
number:.....
- 8.4 TYPE OF COMPANY/ FIRM
- ☐ Partnership/Joint Venture / Consortium
  - ☐ One person business/sole propriety
  - ☐ Close corporation
  - ☐ Company
  - ☐ (Pty) Limited
- [TICK APPLICABLE BOX]
- 8.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES
- .....
- .....
- .....
- .....
- .....
- 8.6 COMPANY CLASSIFICATION
- ☐ Manufacturer
  - ☐ Supplier
  - ☐ Professional service provider
  - ☐ Other service providers, e.g. transporter, etc.
- [TICK APPLICABLE BOX]
- 8.7 Total number of years the company/firm has been in business:.....
- 8.8 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBE status level of contributor indicated in paragraphs 1.4 and 6.1 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I / we 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 6.1, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;
  - iv) If the B-BBEE status level of contributor has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser 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 by the National Treasury 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.

WITNESSES

1. ....

2. ....

.....  
SIGNATURE(S) OF BIDDERS(S)

DATE: .....

ADDRESS .....

.....

.....

## SWORN AFFIDAVIT – B-BBEE EXEMPTED MICRO ENTERPRISE

I, the undersigned,

Full name & Surname	
Identity number	

Hereby declare under oath as follows:

1. The contents of this statement are to the best of my knowledge a true reflection of the facts.
2. I am a member / director / owner of the following enterprise and am duly authorised to act on its behalf:

Enterprise Name	
Trading Name	
Registration Number	
Enterprise Address	

3. I hereby declare under oath that:
  - The enterprise is \_\_\_\_\_ % black owned;
  - The enterprise is \_\_\_\_\_ % black woman owned;
  - Based on the management accounts and other information available on the \_\_\_\_\_ financial year, the income did not exceed R10,000,000.00 (ten million rands);
  - Please confirm on the table below the B-BBEE level contributor, **by ticking the applicable box.**

100% black owned	<b>Level One</b> (135% B-BBEE procurement recognition)	
More than 51% black owned	<b>Level Two</b> (125% B-BBEE procurement recognition)	
Less than 51% black owned	<b>Level Four</b> (100% B-BBEE procurement recognition)	

4. The entity is an empowering supplier in terms of **the dti** Codes of Good Practice.
5. I know and understand the contents of this affidavit and I have no objection to take the prescribed oath and consider the oath binding on my conscience and on the owners of the enterprise which I represent in this matter.
6. The sworn affidavit will be valid for a period of 12 months from the date signed by commissioner.

Deponent Signature: \_\_\_\_\_

Date: \_\_\_\_\_

\_\_\_\_\_  
Commissioner of Oaths  
Signature & stamp

**PRICING SCHEDULE**

(Professional Services)

NAME OF BIDDER: ..... RFQ 005-2022-23

**CLOSING TIME 14:00 PM ON 30 SEPTEMBER 2022**

OFFER TO BE VALID FOR 60 DAYS FROM THE CLOSING DATE OF BID.

ITEM NO	DESCRIPTION	BID PRICE IN RSA CURRENCY INCLUSIVE OF <b>**ALL APPLICABLE TAXES</b>
------------	-------------	---

**RFQ 005-2022-23: APPOINTMENT OF THE SERVICE PROVIDER TO CONDUCT A LIFESTYLE AUDIT TO ALL SMS MEMBERS OF THE GOVERNMENT TECHNICAL ADVISORY CENTRE (GTAC) FOR A PERIOD OF FIVE (5) MONTHS**

1. All prices quoted **must** be inclusive of all applicable taxes, if no indication is given, prices will be evaluated as all-inclusive.
2. The financial proposal for this assignment should cover for all assignment activities as per the Terms of Reference (ToR). Refer to paragraph 3 related to pricing
  - a. Prospective service providers will be required to provide a VAT inclusive fixed bid price (with a detailed costing), which must outline the time and costs related to the conducting of lifestyle audits.
  - b. The total number of individuals who will be subjected to the lifestyle audit is still to be determined and the proposal must be based on the lifestyle audit of **ONE** individual SMS member.
  - c. This price will then be applied/multiplied by GTAC over the number of individuals lifestyle audits to be performed.

Description	Unit cost based on One SMS member (All applicable taxes included)	Total cost based on One SMS member (All applicable taxes included)
Lifestyle Audit	R	R

***Note: These amount will be used for evaluation purposes as the total number of individuals who will be subjected to the lifestyle audit is still to be determined***

3. The total cost per individual lifestyle audit should not exceed R22500, inclusive of VAT.
4. Period required for commencement with project after acceptance of bid \_\_\_\_\_
5. Are you a VAT vendor? Yes/No
6. Are the rates quoted firm for the full period? Yes/No
7. If not firm for the full period, provide details of the basis on which adjustments will be applied for, for example consumer price index.

Any enquiries regarding this Request for Quotation (RFQ) procedures may be directed to: [rfp@gtac.gov.za](mailto:rfp@gtac.gov.za)

\*\* "all applicable taxes" includes value- added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies.