

REQUEST FOR QUOTATION (RFQ)

RFQ REFERENCE NUMBER	RFQ 09-09-2026	
PROJECT NAME/ DESCRIPTION OF GOODS, WORK OR SERVICES	PROCUREMENT OF TRAINING SERVICES	
BRIEFING SESSION DETAILS	Compulsory (please tick or cross the applicable session)	
	Non-compulsory (please tick or cross the applicable session)	
	Date: Time: Venue/ platform:	
RFQ CLOSING DETAILS	Date: 08 October 2026 Time: 11h00 a.m. RFQ must be submitted to Email: Quotation3@cbrta.co.za	
RFQ VALIDITY PERIOD	60 Working days (Commencing from the official closing date)	
ENQUIRIES	lindiwe.makole@cbrta.co.za	

DIRECTIVE TO BIDDERS ON COMPLETION OF STANDARD BIDDING DOCUMENT FORMS OF BID PROPOSAL

1. The purpose of this document is to guide bidders on the completion of standard bidding document forms of the C-BRTA bid.
2. The date on all standard bidding documents must be a date which is within the bid/RFQ/RFP advertising period.
3. The last column of the table below must be ticked as an indication that each document and its requirements have been complied with by the bidder.

DOCUMENT	DIRECTIVE	COMPLIED/ NOT COMPLIED
Invitation to Bid	The bidder is required to complete this document in full and signed off. The bidder must tick (circle/erase) "YES OR NO" on this document. The bidder may not ignore any clause and/or write "not applicable (N/A)" unless it is the only option available, e.g., are you a foreign based supplier for the goods/services/works offered? If the answer is no, then on the questionnaire to bidding foreign suppliers. The bidder may write N/A.	
Bidder's Disclosure	This document must be completed in full and be signed off. The bidder must tick (circle/erase) "YES OR NO" on this document and indicate not applicable where necessary. The bidder must disclose if the company or any of its directors have an interest in other companies whether they bid or not. Should a bidder have more companies to declare, such information can be provided on a separate sheet in the format prescribed. The information captured or disclosed for each director/ owner etc must be in line with what is captured in the central supplier database report.	
Central supplier database report	The bidder must attach a Central Supplier Database report printed from https://secure.csd.gov.za/	
Preference points claim form	The bidder must fully complete the SBD form and sign off. The bidder must allocate correct preference points, the preference points claimed will be verified using the following: - Broad-Based Black Economic Empowerment Certificate (B-BBEE certificate) - Central Supplier Database report The bidder must submit the documents above to qualify for preference points.	
Pricing schedule	The bidder must complete the supplied pricing schedule and sign-off. The bidder may add other applicable costs which may not be covered by the C-BRTA pricing schedule. In addition, the bidder must submit a detailed price quotation on the company letterhead.	
Bid proposal	The bidder must submit a detailed bid proposal in line with the specifications/terms of reference, if applicable	

**PART A
INVITATION TO BID**

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE CROSS-BOARDER ROAD TRANSPORT AGENCY

BID NUMBER:		CLOSING DATE:		CLOSING TIME:	
DESCRIPTION					

BID RESPONSE DOCUMENTS MAY BE SUBMITTED VIA THE OFFICIAL EMAIL ADDRESS ON THE COVER PAGE

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO	TECHNICAL ENQUIRIES MAY BE DIRECTED TO:
CONTACT PERSON	CONTACT PERSON
TELEPHONE NUMBER	TELEPHONE NUMBER
FACSIMILE NUMBER	FACSIMILE NUMBER
E-MAIL ADDRESS	E-MAIL ADDRESS

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

ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	☐ Yes ☐ No [IF YES ENCLOSE PROOF]	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?	☐ Yes ☐ No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
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QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS

IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?	☐ YES ☐ NO
DOES THE ENTITY HAVE A BRANCH IN THE RSA?	☐ YES ☐ NO
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?	☐ YES ☐ NO
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?	☐ YES ☐ 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

1. BID SUBMISSION:

- 1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
- 1.2. **ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED (NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.**
- 1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
- 1.4. **THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).**

2. TAX COMPLIANCE REQUIREMENTS

- 2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
- 2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
- 2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
- 2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
- 2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
- 2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
- 2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

Signature of bidder:	
Capacity Under Which This Bid Is Signed: (Proof of authority must be submitted e.g. company resolution)	
Date:	

1. Introduction to C-BRTA

- 1.1. The Cross-Border Road Transport Agency (C-BRTA) is PFMA Schedule 3A Agency established through the Cross-Border Road Transport Act 4 of 1998 and provides advice, regulation, facilitation and law enforcement in respect of commercial cross border road transportation. The Act gives the C-BRTA mandate to licence commercial cross border road transport operators by issuing permits to operate. The provision of cross-border transport services in South Africa is subject to the provisions of the Cross-Border Road Transport Act. In terms of the Act, any person or organisation wishing to provide cross-border transport services must apply to the Cross-Border Road Transport Agency's Regulatory Committee for a Permit to conduct cross-border business.
- 1.2. The Cross-Border Road Transport Agency's (C-BRTA) thus exists, amongst others, to improve the flow of passengers and freight road transport in the region, introduce regulated competition in cross-border road transport, reduce operational constraints for the cross-border road transport industry, provide oversight and monitoring functions, and to improve the unimpeded transport flow by road of freight and passengers.

2. General rules and instructions

- 2.1. Bidders or their agents shall not make any news releases concerning this RFQ or the awarding of the same or any resulting agreement(s) without the consent of, and then only in co-ordination with, C-BRTA and its Client.
- 2.2. Bidders must be registered on the Central Supplier Database (CSD) to be able to conduct business with C-BRTA.
- 2.3. Any bidder who has reasons to believe that the RFQ specification is based on a specific brand must inform C-BRTA within three (3) days after the publication of the RFQ.
- 2.4. Bidders will be given seven (7) days to correct their non-tax compliance and three (3) days to fully disclose any information on the Standard Bidding Documents, failure such bidders will be disqualified.
- 2.5. This RFQ is subject to Government Procurement: General Contract Conditions – July 2011, Special Contract Conditions and any other contract conditions to be finalised during contracting.

3. Instructions for submitting bids

- 3.1. Bidders should submit their bid responses strictly to the email address on the covering page. Bid responses received outside this email address will NOT be considered.
- 3.2. Bid responses will NOT be considered if submitted after the closing date and time.

4. RFQ Returnable

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

4.2. Schedule Index:

- Schedule 1: Completed and signed SBD 1
- Schedule 2: Central Supplier Database (CSD) Registration Report
- Schedule 3: Bidder's Tax Compliance System PIN
- Schedule 4: Sworn Affidavit or valid B-BBBEE Certificate
- Schedule 5: Completed and signed SBD 4 – Bidder's Disclosure
- Schedule 6: Bidder's Disclosure Annexure A
- Schedule 7: Completed and signed SBD 6.1 – Preference Points Claim
- Schedule 8: Price quotation in a company letterhead

5. Terms of Reference/ specifications

TRAINING COURSE	COURSE DESCRIPTION	RECOMMENDED DURATION	ACCREDITATION RECOMMENDATION	DELIVERY MODE	DELEGATES
Foundational HR Trainings	Introduces core HR principles including recruitment, onboarding, employee relations, performance management, HR administration and employee development.	2–3 Days	SETA/SAQA-aligned where applicable	Online	1
Project Management Training	Covers project planning, scope management, scheduling, budgeting, risk management, stakeholder engagement, monitoring and project closure.	2–3 Days	CPD / Professional Project Management Certification	Online	3
Sage 300 People	Practical training on employee records, payroll administration, HR processes, reporting and effective use of the Sage 300 People platform.	2–3 Days	Sage-recognised Certificate	Online	2
Forensic Investigation Skills	Covers investigation planning, evidence collection and preservation, interviewing,	2–3 Days	CPD / Industry-recognised Certificate	Online	1

TRAINING COURSE	COURSE DESCRIPTION	RECOMMENDED DURATION	ACCREDITATION RECOMMENDATION	DELIVERY MODE	DELEGATES
	fraud indicators, investigation procedures and professional reporting.				
Professional PowerPoint Design and Presentation	Develops professional presentation design, visual storytelling, slide layouts, data visualisation, presentation techniques and audience engagement.	2–3 Days	CPD / Certificate of Competence	Online	1
Digital Marketing	Covers digital marketing strategy, social media marketing, content creation, SEO, email marketing, digital campaigns and performance analytics.	2–3 Days	CPD / Industry Certification	Online	1
Photography	Covers photography fundamentals, camera operation, composition, lighting, exposure, image management and professional photography techniques.	2–3 Days	CPD / Skills Certificate	Online	1
Document Management	Covers document classification, electronic filing, version control, records management, document security, retention and retrieval.	2–3 Days	CPD / Records Management Certificate	Online	1

TRAINING COURSE	COURSE DESCRIPTION	RECOMMENDED DURATION	ACCREDITATION RECOMMENDATION	DELIVERY MODE	DELEGATES
Artificial Intelligence	Covers AI fundamentals, generative AI applications, prompt engineering, automation, workplace applications, ethics and responsible AI governance.	2–3 Days	CPD / AI Skills Certificate	Online	1
Data Analysis and Report Writing	Develops skills in data collection, analysis, interpretation, visualisation and converting analytical findings into clear and decision-oriented reports.	2–3 Days	CPD / Data Analytics Certificate	Online	1
International Trade & Transport Policy – Focus on SADC Protocols, Trade Corridors and Regulatory Harmonisation	Examines SADC trade protocols, regional integration, transport corridors, customs processes, trade facilitation and regulatory harmonisation.	2–3 Days	CPD / Professional Trade & Transport Certificate	Online	1
Transport Demand Analysis and Project Assessment (CIV5132Z)	Covers transport demand forecasting, travel behaviour, demand modelling, project appraisal and assessment of transport infrastructure investments.	2–3 Days	Professional Accreditation	Online	1

TRAINING COURSE	COURSE DESCRIPTION	RECOMMENDED DURATION	ACCREDITATION RECOMMENDATION	DELIVERY MODE	DELEGATES
Big Data Analytics and Transport (CIV5164Z)	Explores the application of big data, data analytics and emerging technologies to transport planning, operations and strategic decision-making.	2–3 Days	Professional Accreditation	Online	1
Public Transport System Design and Operations Management (CIV5071Z)	Covers public transport network planning, system design, scheduling, operations management, service quality and performance evaluation.	2–3 Days	Professional Accreditation	Online	1
Discrete Choice Modelling and Stated Choice Survey Design (CIV5127Z)	Covers discrete choice theory, stated choice survey design, experimental design, data collection and analysis of transport user preferences.	2–3 Days	Professional Accreditation	Online	1
Regulatory & Compliance	Covers regulatory frameworks, compliance requirements, governance, compliance monitoring, controls, reporting and management of regulatory obligations.	2–3 Days		Online	1
Risk Management	Covers risk identification, risk assessment, mitigation	2–3 Days	CPD / ISO 31000-aligned Certificate	Online	1

TRAINING COURSE	COURSE DESCRIPTION	RECOMMENDED DURATION	ACCREDITATION RECOMMENDATION	DELIVERY MODE	DELEGATES
	strategies, internal controls, risk monitoring, reporting and organisational risk governance.				
Sustainable Transport Development	Covers sustainable mobility, integrated transport planning, environmental sustainability, emissions reduction, accessibility and climate-resilient transport.	2–3 Days		Online	1
Introduction to E-Mobility	Introduces electric vehicle technology, charging infrastructure, e-mobility policy, economics, environmental impacts and implementation considerations.	2–3 Days		Online	1
CompTIA Cloud+	Covers cloud infrastructure, cloud deployment, security, operations, troubleshooting, availability and cloud governance in preparation for certification.	2–3 Days	CompTIA Cloud+ Certification	Online	1
CompTIA Security+	Covers cybersecurity principles, threats, vulnerabilities, security	2–3 Days	CompTIA Security+ Certification	Online	1

TRAINING COURSE	COURSE DESCRIPTION	RECOMMENDED DURATION	ACCREDITATION RECOMMENDATION	DELIVERY MODE	DELEGATES
	architecture, security operations, risk management and incident response.				
Microsoft Certified: Azure Fundamentals (AZ-900)	Covers cloud concepts, Azure services, Azure architecture, security, governance, compliance, pricing and support.	2–3 Days	Microsoft Certified: Azure Fundamentals (AZ-900)	Online	1
Microsoft Certified: Azure Developer Associate (AZ-204)	Covers development and deployment of Azure solutions, compute, storage, APIs, authentication, security, monitoring and application integration.	2–3 Days	Microsoft Certified: Azure Developer Associate (AZ-204)	Online	1
Acquisition Course	Covers procurement and acquisition processes, sourcing, specifications, bid evaluation, contracting, compliance and supplier management.	2–3 Days	CIPS / SETA-aligned or relevant procurement accreditation	Online	1
Customer Services	Develops customer service skills including professional communication, customer needs analysis, complaint handling, service recovery and	2–3 Days	Certificate of Competence	Online	1

TRAINING COURSE	COURSE DESCRIPTION	RECOMMENDED DURATION	ACCREDITATION RECOMMENDATION	DELIVERY MODE	DELEGATES
	relationship management.				

5.1. Evaluation Criteria for this RFQ

The RFQ will be evaluated using the 80/20 preference points system in terms of the Preferential Procurement Regulations 2022. **The following three (3) steps will be followed to evaluate this RFQ:**

- a) Mandatory Compliance,
- b) Price & Specific Goals, and
- c) Administrative Compliance.

5.1.1. Step 1: Mandatory compliance

Documents that must be submitted	Non-submission of any of the mandatory items against shall result to immediate disqualification.
Compliance	The bidder must comply to the requirements of the specification/ terms of reference
Pricing Schedule	Submit full details of the pricing proposal/ quotation in the bidding company letterhead
Regulatory/ professional compliance	Please specify if applicable. If not, please remove

5.1.2. Step 2: Price and Specific goals (80/20)

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

The following formula will be used to calculate the points for price

Where

Ps = Points scored for comparative price of bid under consideration

Pt = Comparative price of bid under consideration

Pmin = Comparative price of lowest acceptable bid

5.1.3. Specific Goals

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

Note to tenderers: Bidders must indicate how they claim points for each preference point system. Thus, tenderers are required to indicate number of points in line with their B-BBEE Status Level and Ownership.

No	The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system)	Means of verification	Number of points claimed (80/20 system) (To be completed by the tenderer)
A	BBBEE Level 1 – 4	10	BBBEE or Sworn affidavit submitted with the bid	
B	Women owned Enterprises	5	Central Supplier Database	
C	Enterprises owned by disabled people	5	Medical report	
D	Total point claimed	D= A + B + C		

5.1.4. Step 2: Administrative Compliance

Documents that must be submitted	
Invitation to Bid – SBD 1	Complete and sign the supplied pro forma document
Tax Status	Submit proof of Central Supplier Database report.
Bidders Disclosure Form – SBD4	Complete and sign the supplied pro formadocument
Preference Point Claim Form – SBD 6.1	Non-submission will lead to a zero (0) score on Specific goals
Pricing Schedule	Submit full details of the quotations on a company letterhead

PRICING SCHEDULE – FIRM PRICES

Name of bidder:	RFQ No:
Closing Time: 11:00	Closing date:

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

ITEM NO.	DESCRIPTION	QUANTITY	UNIT PRICE (VAT EXCL.)	Total PRICE (VAT EXCL.)
1				
2				
3				
4				
5				
Value Added Tax (VAT) at 15%				
Total RFQ Price (VAT Inclusive				

Brand and model, please specify				
Country of origin				
Does the offer comply with the specification(s)? Please tick or cross the correct answer	Yes		No	
If not to specification, indicate deviation(s)				
Period required for delivery (days)				
Delivery basis (once-off/ partial)				
All delivery costs must be included in the bid price, for delivery at the prescribed destination.				

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise, employed by the state? **YES/NO**

2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of State institution

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

2.2.1 If so, furnish particulars:

.....

¹ the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

.....

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 consortium² will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 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

² Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

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.

- 3.6.1 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

Annexure A – bidders Disclosure form as per section 2.3 of SBD 4 form

Bidders are requested to declare all enterprises/ companies any of its directors/ trustees/ shareholders/members/ partners have interest in, the enterprises/companies disclosed must be equal or more than those disclosed on the Central Supplier Database (CSD) report.

Name of Director	Name of the enterprise/ company	Supplier No. (MAAA....)	Registration No	Director status [Active/Resigned]

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

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

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

1. GENERAL CONDITIONS

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

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

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

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price; and
- (b) Specific Goals.

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

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

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

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

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

1.8 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to

preferences, in any manner required by the organ of state.

2. DEFINITIONS

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

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

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

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

80/20	or	90/10
$P_s = 80 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right)$	or	$P_s = 90 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right)$
Where		

P_s = Points scored for price of tender under consideration

P_t = Price of tender under consideration

P_{min} = 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	or	90/10
$P_s = 80 \left(1 + \frac{P_t - P_{max}}{P_{max}} \right)$	or	$P_s = 90 \left(1 + \frac{P_t - P_{max}}{P_{max}} \right)$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmax = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

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

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

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

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

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

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

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

No	The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system)	Means of verification	Number of points claimed (80/20 system) (To be completed by the tenderer)
A	BBBEE Level 1 – 4	10	BBBEE or Sworn affidavit submitted with the bid	
B	Women owned Enterprises	5	Central Supplier Database	
C	Enterprises owned by disabled people	5	Medical report	
D	Total point claimed	D= A + B + C		

5. SUBMISSIONS BY CONSORTIUMS AND JOINT VENTURES

- 5.1 If a submission is made by a consortium or Joint Venture, the points claimed for ownership must be detailed separately on an attachment showing the following:
- The percentage (%) of the contract allocated to each JV member or consortium member. This should also be included in an agreement to be made available on request by C-BRTA
 - The percentage ownership by race category of each JV member or consortium member in each of the specific goals relevant to this bid.
 - The total points claimed will be the sum of the percentage contract allocation for each partner multiplied by the percentage weighting for the race category, multiplied by the percentage ownership in the relevant specific goal.

6. DECLARATION WITH REGARD TO COMPANY/FIRM

6.1. Name of company/firm.....

6.2. Company registration number:

6.3. 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]

6.4. 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:

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