



## REQUEST FOR QUOTATIONS

RFQ NUMBER: RFQ/SASSETA/2425117

CLOSING DATE: 06 August 2024

TIME: 15H00

DESCRIPTION: Evaluation Study to improve the implementation of career fairs for the stakeholders

COMPULSORY BRIEFING: Yes ☐ No ☒

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### **FOR COMPLETION BY SERVICE PROVIDER:**

NAME OF BIDDING COMPANY: \_\_\_\_\_

CONTACT PERSON: \_\_\_\_\_

CONTACT NUMBER: \_\_\_\_\_

CSD REGISTRATION NUMBER: MAAA\_\_\_\_\_

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

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***NB: If you receive any suspicious calls asking for payment to secure an award or that the outcome can be influenced in your favour, please immediately inform the SASSETA Anti-Corruption Hotline at 0800 204 143 for further investigations.***

## **DOCUMENTS IN THIS BID DOCUMENT PACK**

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

1. Proposed selection criteria
2. Invitation to Quote (SBD 1) (requires the attachment of proof of authority)
3. Pricing Schedule (SBD 3.3)
4. Declaration of Interest (SBD 4)
5. Preference Points Claim form in terms of Preferential Procurement Regulations 2022 (SBD 6.1).
6. Documents required for claiming Specific Goals
7. Submission Checklist

## **NB.: DOCUMENT SUBMISSION**

**Bidders are to complete and submit all Standard Bidding Documents (SBD) forms mentioned above from bullet 2 to 5.**

## **1. PROPOSED SELECTION CRITERIA**

### **1.1 Compliance with minimum requirements**

1.1.1 All proposals duly lodged will be examined to determine compliance with bidding requirements and conditions.

#### **1.1.2 Conditions for selection/short listing**

##### **1.1.2.1 Phase 1 – Service Providers to:**

- Submit their proposal by the closing date and time. **Proposals submitted after the closing date and time will be disqualified from further evaluation.**
- Complete and submit all Standard Bidding Documents (SBD) forms mentioned above on page 2 of this document, namely: SBD1, SBD3.3, SBD4 and SBD 6.1.
- Be registered on the National Treasury Central Supplier Database (CSD) by the closing date and time of this request for quotation. Bidders are to provide SASSETA with a copy of their CSD registration report downloaded from the National Treasury CSD Website.
- Initial each page of the General Condition of Contract (Annexure A) and submit with the proposal

##### **1.1.2.2 The proposed selection criteria**

- **Functionality Evaluation**

All proposals will be evaluated on the criteria provided in the table below. The proposals from all bidders will be rated on a scale of 0 to 1 as follows:

0: Required documents(s)/item(s) not submitted/ Unacceptable/ Does not meet set criteria.

1: Exceptional mastery of the requirement. Should ensure extremely effective performance.

## FUNCTIONALITY TABLE

The functionality table addresses the proposed technical approach and research methodology, as well as the suitability of the project team. Bidders are required to submit the requested documents below for evaluation purposes:

| ELEMENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | FUNCTIONALITY EVALUATION                                                                   |                                                                                                                                                                                                                                                                                                                                                                                              | FUNCTIONALITY WEIGHT | TOTAL SCORE |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|-------------|
| Proposed technical approach and research / evaluation methodology of the bidder                                                                                                                                                                                                                                                                                                                                                                                                                                              | Rating out of1                                                                             | Evaluation criteria                                                                                                                                                                                                                                                                                                                                                                          |                      |             |
| Bidding Company to demonstrate comprehensive understanding and experience in terms of approaches of undertaking research studies and outline research/ evaluation design and methodology to beapplied and demonstrate knowledge and experience in:<br><ul style="list-style-type: none"><li>utilizing qualitative and quantitative research methods;</li><li>the application of different data analysis methods; and</li><li>the production of research reports, with feasible recommendations.</li></ul> <b>(35 Points)</b> | <b>Bidding Company to outline research/evaluation design and methodology to be applied</b> |                                                                                                                                                                                                                                                                                                                                                                                              |                      |             |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | 0                                                                                          | Research / evaluation methodology and report writing details NOT included/ Short research / evaluation methodology and report writing details that do not relate to the full scope of work.                                                                                                                                                                                                  | 35%                  |             |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | 1                                                                                          | <ul style="list-style-type: none"><li>Detailed Research/evaluation designs and methodologies</li><li>Detailed research/evaluation data analysis techniques/methods</li><li>Preliminary literature review</li><li>Deliverables</li><li>Project plan which indicates activities and timeframes that adhere to the terms of reference, and</li><li>Detailed risk and mitigation plan.</li></ul> |                      |             |
| The Bidding Company to attach three (3) or more signedreference letters demonstrating experience in conducting research , evaluation, tracer, impact studies from different clients and must be on a client’s letterhead with contact details. <b>(10 Points)</b>                                                                                                                                                                                                                                                            | <b>Reference letters for the work done previously.</b>                                     |                                                                                                                                                                                                                                                                                                                                                                                              |                      |             |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | 0                                                                                          | The bidder has NOT attached or attached less than three (less 3) reference letters.                                                                                                                                                                                                                                                                                                          | 10%                  |             |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | 1                                                                                          | The bidder has attached three (3) or more reference letters.                                                                                                                                                                                                                                                                                                                                 |                      |             |

|                                                                                                                                                                                                                                                                                                               |                                          |                                                                                                                                                                               |      |  |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|--|
| Suitability of the project team leader                                                                                                                                                                                                                                                                        | Qualifications & Publications            |                                                                                                                                                                               |      |  |
| The project team leader must be in possession of a masters/Doctoral degree in social sciences. <b>(20 points)</b><br><br><b>NB: Copies of certificates must be attached.</b><br>International qualifications must be verified by SAQA and a copy of letters confirming verification.                          | 0                                        | Certified copies of certificates or letter(s) confirming international qualification(s) not attached.                                                                         | 15%  |  |
|                                                                                                                                                                                                                                                                                                               | 1                                        | Certified copy of a master's / PhD degree in social sciences or conformation of an equivalent international qualification attached.                                           |      |  |
| The project team leader to demonstrate four (4) or more research outputs published on the DHET Accredited Journals with the proposal for SASSETA's. The bidder to attach these four or more research articles. <u>The Bidder to record the reference number for the published journal.</u> <b>(40 points)</b> | Publications in DHET accredited Journals |                                                                                                                                                                               |      |  |
|                                                                                                                                                                                                                                                                                                               | 0                                        | The project team leader has completed and attached less than three (less 4) published articles in the Department of Higher Education and Training (DHET) accredited Journals. | 40%  |  |
|                                                                                                                                                                                                                                                                                                               | 1                                        | The project team leader has completed and attached Four (4) or more research published Articles in the Department of Higher Education and Training (DHET) accredited Journals |      |  |
| Total                                                                                                                                                                                                                                                                                                         |                                          |                                                                                                                                                                               | 100% |  |

**NB: Bidders need to obtain a minimum of 80% for functionality for them to be evaluated further. If none of the bidders obtain 80% threshold, they will be eliminated from further evaluation.**

## PART A - INVITATION TO QUOTE

|                                                                                                                                                                                                                            |                                                                                     |               |                                                                          |                               |                                                                                        |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|---------------|--------------------------------------------------------------------------|-------------------------------|----------------------------------------------------------------------------------------|
| <b>YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)</b>                                                                                                                           |                                                                                     |               |                                                                          |                               |                                                                                        |
| BID NUMBER:                                                                                                                                                                                                                | RFQ/SASSETA/2425117                                                                 | CLOSING DATE: | 06 August 2024                                                           | CLOSING TIME:                 | 15H00                                                                                  |
| DESCRIPTION                                                                                                                                                                                                                | Evaluation Study to improve the implementation of career fairs for the stakeholders |               |                                                                          |                               |                                                                                        |
| <b>BID RESPONSE DOCUMENTS MAY BE SENT TO:</b>                                                                                                                                                                              |                                                                                     |               |                                                                          |                               |                                                                                        |
| pmonageng@sassetta.org.za                                                                                                                                                                                                  |                                                                                     |               |                                                                          |                               |                                                                                        |
| <b>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO</b>                                                                                                                                                                      |                                                                                     |               | <b>TECHNICAL ENQUIRIES MAY BE DIRECTED TO:</b>                           |                               |                                                                                        |
| CONTACT PERSON                                                                                                                                                                                                             | Palesa Monageng                                                                     |               | CONTACT PERSON                                                           | Palesa Monageng               |                                                                                        |
| E-MAIL ADDRESS                                                                                                                                                                                                             | pmonageng@sassetta.org.za                                                           |               | E-MAIL ADDRESS                                                           | pmonageng@sassetta.org.za     |                                                                                        |
| <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                                                                                                                                                                                                    |                                                                                     |               |                                                                          |                               |                                                                                        |
| SUPPLIER COMPLIANCE STATUS                                                                                                                                                                                                 | TAX COMPLIANCE SYSTEM PIN:                                                          |               | OR                                                                       | CENTRAL SUPPLIER DATABASE No: | MAAA                                                                                   |
| B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE                                                                                                                                                                               | TICK APPLICABLE BOX]<br><input type="checkbox"/> Yes <input type="checkbox"/> No    |               | B-BBEE STATUS LEVEL SWORN AFFIDAVIT                                      |                               | [TICK APPLICABLE BOX]<br><input type="checkbox"/> Yes <input type="checkbox"/> No      |
| <b>[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN (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<br>[IF YES ENCLOSE PROOF]  |               | ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED? |                               | <input type="checkbox"/> Yes <input type="checkbox"/> No<br>[IF YES, ANSWER PART B:3 ] |
| <b>QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS</b>                                                                                                                                                                          |                                                                                     |               |                                                                          |                               |                                                                                        |
| IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?                                                                                                                                                            |                                                                                     |               | <input type="checkbox"/> YES <input type="checkbox"/> NO                 |                               |                                                                                        |
| DOES THE ENTITY HAVE A BRANCH IN THE RSA?                                                                                                                                                                                  |                                                                                     |               | <input type="checkbox"/> YES <input type="checkbox"/> NO                 |                               |                                                                                        |
| 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?                                                                                                                                                                  |                                                                                     |               | <input type="checkbox"/> YES <input type="checkbox"/> NO                 |                               |                                                                                        |
| <b>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.</b> |                                                                                     |               |                                                                          |                               |                                                                                        |

## PART B

## TERMS AND CONDITIONS FOR BIDDING

|                                                                                                                                                                                                                                                |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>1. BID SUBMISSION:</b>                                                                                                                                                                                                                      |
| 1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.                                                                                                                   |
| 1.2. <b>ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.</b>                                                                                                    |
| 1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT. |
| 1.4. <b>THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).</b>                                                                                                                                         |
| <b>2. TAX COMPLIANCE REQUIREMENTS</b>                                                                                                                                                                                                          |
| 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 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.**

**NAME OF SIGNATORY** .....

**SIGNATURE OF BIDDER:** .....

**N/B.:** If a Company has one director as listed on CSD, the one Director MUST sign these documents on behalf of the Company. Any other member of the Company will require a Company Resolution to be attached to this submission signed by the duly Authorised Director.

**N/B.:** If the Company has more than one Director as listed on CSD, a signed Company Resolution must be attached to confirm that the one Director can sign on behalf of the Company. Any other member of the Company will require a Company Resolution to be attached to this submission signed by the duly Authorised Directors.

**CAPACITY UNDER WHICH THIS BID IS SIGNED:** .....  
(Proof of authority must be submitted e.g. company resolution)

**DATE:** .....

**PRICING SCHEDULE**  
**(Professional services)**

|                            |                                     |
|----------------------------|-------------------------------------|
| NAME OF BIDDER: .....      | BID NO.: <b>RFQ/SASSETA/2425117</b> |
| CLOSING TIME: <b>15H00</b> | CLOSING DATE: <b>06 August 2024</b> |

OFFER TO BE VALID FOR **90** DAYS FROM THE CLOSING DATE OF BID.

| ITEM<br>NO | DESCRIPTION | BID PRICE IN RSA CURRENCY<br>**(ALL APPLICABLE TAXES INCLUDED) |
|------------|-------------|----------------------------------------------------------------|
|------------|-------------|----------------------------------------------------------------|

1. The accompanying information must be used for the formulation of proposals.
2. All costs must be included in the price, including all applicable taxes “value-added tax” (VAT), etc

| No                               | Item                                                             | COST INCL. VAT (where applicable) |
|----------------------------------|------------------------------------------------------------------|-----------------------------------|
| 1.                               | Inception report(s)                                              | R                                 |
| 2.                               | Literature review, data collection instruments and the data sets | R                                 |
| 3.                               | Data Analysis, findings and recommendations                      | R                                 |
| 4.                               | Draft reports                                                    | R                                 |
| 5.                               | Final reports                                                    | R                                 |
| 6.                               | Power-Point presentations                                        | R                                 |
| <b>TOTAL COST (INCL. OF VAT)</b> |                                                                  | <b>R</b>                          |

**NB: Bidders MUST complete this amount on this document, and it MUST be the same as the total amount on the quotation incl. VAT.**

Bidders are to complete the name and surname of the proposed remuneration consultants on this assignment and ensure that comprehensive CV of the remuneration consultants are attached to the proposal as follows:

| NO | ROLE IN THE TEAM            | NAME AND SURNAME (only one name to be written below. If more than one name is written, SASSETA will evaluate the top candidate only) | IS THE CERTIFICATE ATTACHED<br>(Circle the response below) | ARE THE DHET PUBLICATIONS IN ACCREDITED JOURNALS ATTACHED<br>(circle the response below) |
|----|-----------------------------|--------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------|------------------------------------------------------------------------------------------|
| 1. | Project manager/Team leader |                                                                                                                                      | Yes/No                                                     | Yes/No                                                                                   |

.....  
**Signature**

.....  
**Date**

.....  
**Position**

.....  
**Name of bidder**

**(MUST be signed by a duly Authorised Delegate. A signed Company Resolution must be submitted).**

## BIDDER'S DISCLOSURE

### 1. PURPOSE OF THE FORM

- 1.1 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.
- 1.2 Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

### 2. Bidder's declaration

- 2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise, employed by the state? **YES/NO**
- 2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in the table below

| Full Name | Identity Number | Name of State institution |
|-----------|-----------------|---------------------------|
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |

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

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

- 2.2.1 If so, furnish particulars:

.....

.....

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

- 2.3.1 If so, furnish particulars:

.....

.....

### 3. DECLARATION

I, the undersigned, (name)

In submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium<sup>1</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.
- 3.5 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.6 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.7 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT. I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA

SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING  
ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS  
DECLARATION PROVE TO BE FALSE.

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

.....  
**Signature**

.....  
**Date**

.....  
**Position**

.....  
**Name of bidder**

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

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

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

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

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### 1. GENERAL CONDITIONS

- 1.1 The following preference point systems are applicable to invitations to quote:
- the 80/20 system for requirements with a Rand value of up to R1 000 000 (all applicable taxes included).

**1.2 To be completed by the organ of state**

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

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

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

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

**1.4 To be completed by the organ of state:**

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

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

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

- 1.7 The organ of state reserves the right to request a bidder, either before a quotation is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

## 2. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

### 3. POINTS AWARDED FOR PRICE

#### 3.1 THE 80/20 PREFERENCE POINT SYSTEMS

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

**80/20**

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

Where

Ps = Points scored for the price of the quotation under consideration

Pt = Price of the quotation under consideration

Pmin = Price of lowest acceptable quotation

#### 3.2 POINTS AWARDED FOR SPECIFIC GOALS

3.2.1 In terms of Regulations 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the quotation.

3.2.2 For the purposes of this quotation, the bidder will be allocated points based on the goals stated in table 1 below as may be supported by proof/documentation stated in the conditions of this bid:

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

***Note to bidders: The Bidder must indicate how they claim points for each preference point system.)***

| The specific goals allocated points in terms of this bid | Number of points allocated (80/20 system) | Number of points claimed (80/20 system) (To be completed by the bidder) |
|----------------------------------------------------------|-------------------------------------------|-------------------------------------------------------------------------|
| Black People Ownership (100%)                            | 10.00                                     |                                                                         |
| Black Youth Ownership (30%)                              | 5.00                                      |                                                                         |
| The promotion of South African-Owned Enterprises         | 5.00                                      |                                                                         |
| <b>Total Points</b>                                      | <b>20</b>                                 |                                                                         |

**DECLARATION WITH REGARD TO COMPANY/FIRM**

3.3 Name of company/firm.....

3.4 Company registration number: .....

3.5 TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One-person business/sole propriety
- ☐ Close corporation
- ☐ Public Company
- ☐ Personal Liability Company
- ☐ (Pty) Limited
- ☐ Non-Profit Company
- ☐ State Owned Company

[TICK APPLICABLE BOX]

3.6 I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the quotation, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 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 bidding process;
- (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
- (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
- (d) recommend that the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
- (e) forward the matter for criminal prosecution, if deemed necessary.

.....  
**SIGNATURE(S) OF BIDDER(S)**

**SURNAME AND NAME:** .....

**DATE:** .....

**ADDRESS:** .....

.....  
.....  
.....  
.....

## **DOCUMENTS REQUIRED FOR CLAIMING SPECIFIC GOALS**

1. As per bullet 1.6 and 1.7 of the Preference Points Claim Form in terms of the Preferential Procurement Regulations 2022, bidders are required to submit the SASSETA verification document(s) in order to be allocated the specific goals claimed:
  - a) An Original/Certified copy of a valid B-BBEE Certificate or Sworn Affidavit.
  - b) Valid Companies and Intellectual Property Commission (CIPC) Company registration documents
  - c) Certified copy/ies of Identity documents of the Company Directors
  - d) CSD report

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

.....  
**Signature**

.....  
**Date**

.....  
**Position**

.....  
**Name of bidder**

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

***If you receive any suspicious calls asking for payment to secure an award of a bid or that the outcome of a tender can be influenced in your favour, please immediately inform the SASSETA Anti-Corruption Hotline at 0800 204 143 for further investigation.***

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

| NO. | DETAILS                                                                                                                                                                                                                                                                                                                                                                                                                                        | TICK BY BIDDER |
|-----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| 1.  | Part 1: Completed and signed the invitation to bid document (SBD 1)<br>• <b>To be signed by a duly Authorised Delegate.</b>                                                                                                                                                                                                                                                                                                                    |                |
| 2.  | Part 2: Completed and signed pricing schedule (SBD 3.3)<br>• <b>To be signed by a duly Authorised Delegate</b>                                                                                                                                                                                                                                                                                                                                 |                |
| 3.  | Part 3: Completed and signed the bidder's declaration (SBD 4). <i>(In case of a consortium/ joint venture, or where sub-Service providers are utilised, each party to the bid to complete and sign the declaration of interest document)</i><br>• <b>To be signed by a duly Authorised Delegate</b>                                                                                                                                            |                |
| 4.  | Part 4: Completed and signed the Preference Points Claim form in terms of the Preferential Procurement Regulations 2022 (SBD 6.1)<br><b>To be signed by a duly Authorised Delegate.</b>                                                                                                                                                                                                                                                        |                |
| 5.  | Part 5: Submitted the General Conditions of Contract (initialled each page)                                                                                                                                                                                                                                                                                                                                                                    |                |
| 6.  | Part 6: Bidders to submit their National Treasury Central Supplier Database (CSD) registration document.                                                                                                                                                                                                                                                                                                                                       |                |
| 7.  | Part 7: Bidder's attached quotation on the Company letterhead inclusive of VAT and any other applicable costs in line with the SBD 3.3                                                                                                                                                                                                                                                                                                         |                |
| 8.  | Part 8: Bidding Company to demonstrate comprehensive understanding and experience in terms of approaches of undertaking research studies and outline research/ evaluation design and methodology to be applied and demonstrate knowledge and experience in, utilizing qualitative and quantitative research methods, the application of different data analysis methods; and the production of research reports, with feasible recommendations |                |
| 9.  | Part 9: The Bidding Company is to attach three (3) or more signed reference letters demonstrating experience in conducting research, evaluation, tracer, and impact studies from different clients and must be on a client's letterhead with contact details.                                                                                                                                                                                  |                |
| 10. | Part 10: The project team leader must be in possession of a masters/Doctoral degree in social sciences. Copies of certificates must be attached. International qualifications must be verified by SAQA and a copy of letters confirming verification.                                                                                                                                                                                          |                |
| 11. | Part 11: The project team leader to demonstrate four (4) or more research outputs published on the DHET Accredited Journals with the proposal for SASSETA's. The bidder to attach these four or more research articles.                                                                                                                                                                                                                        |                |
| 12. | <b>Part 12: Bidders to submit:</b><br>• <b>NB.: Non-submission of the below-mentioned documents will lead to specific goal points <u>NOT</u> being awarded.</b><br>• An original/Certified copy of a valid B-BBEE Certificate or Sworn Affidavit.<br>• Valid company and intellectual Property Commission (CIPC) Company registration.<br>• Certified copy (ies) of identity documents of the Company directors.                               |                |

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