

CONSTRUCTION EDUCATION AND TRAINING AUTHORITY

BID NO: 04-2021/22

APPOINTMENT OF TRAVEL MANAGEMENT COMPANY AND RELATED SERVICES

RFP NUMBER:	BID NO: 04-2021/22
DESCRIPTION:	Request for proposal for the provision of travel management services for Construction Education and Training Authority for a period up to 2024
PUBLISH DATE:	03 October 2021
CLOSING DATE:	25 October 2021
CLOSING TIME:	11h00 (Telkom Time)
VALIDITY PERIOD	90 days from the closing date
PREFERENCEPOINT SYSTEM	80/20
BRIEFING SESSION	None
BID RESPONSES MUST BE HAND DELIVERED TO:	CETA Head Office TCM Building 52 on 14th Road Noordwyk Midrand 1687
ATTENTION:	Supply Chain Management



COMPULSORY DOCUMENTS – CRITERION 1

Please note that failure to submit the following documents and/or proof will lead to immediate disqualification:

- 1) Proof of registration with National Treasury Central Supplier Database (CSD). (Please attach proof-certified copy)
- 2) Bidders are required to submit their International Air Transport Association (IATA) licence/ ASATA, IATA and/or any other, body (please attach proof-certified copy)

BID CONDITIONS

- All bidders are required to register on the National Treasury Central Supplier Database (CSD). The CSD proof of registration will be used by CETA to verify the bidder's tax compliant status at the time of bid award.
- This tender will only be awarded to bidders who are tax compliant on National Treasury CSD prior to award.
- **Bidders who meet all the requirements on criterion 1 (compulsory requirements) will be further evaluated on criterion 2 (functionality). Bidders who are successful evaluated on criterion 2 will be further evaluated on criterion 3 (Price and Preference Evaluation)**

OTHER REQUIRED DOCUMENTS

Please note that failure to attach the following documents will result in the forfeiture of preference points:

- **EMEs:**

Sworn affidavit confirming their annual total revenue of R10 million on or less and level of black ownership or a B-BBEE level verification certificate.

- **QSEs**

Sworn affidavit confirming their annual total revenue of between R10 million and R50 million and level of black ownership or B-BBEE level verification certificate

- Bidders other than EMEs and QSEs :

Original and valid B-BBEE status level verification certificate verified by a SANAS accredited verification agency, or a certified copy thereof.

STANDARD BIDDING DOCUMENTS (SBDs)

- Completed and signed:
 - SBD 1
 - SBD 4
 - SBD 6.1
 - SBD 6.2 and Annexure C, D and E
 - SBD 7.2
 - SBD 8
 - SBD 9.

BID DOCUMENTS CHECK LIST The contents of the BID/ TENDER document must be as follows, and numbered as per the numbering below, with each schedule punched, placed in a file and separated from the next schedule with a file divider.

BID DOCUMENTS SUBMISSION:

Bidders are required to submit **one (1) original and two (2) copies** of the bid document. A two-envelope system is used for this tender; bidders must ensure submissions as follows:

Envelope 1: must contain the completed and signed bid documents with relevant supporting documents and must be clearly marked with the tender number, description and bidder name.

Envelope 2: must contain the Pricing schedule and B-BBEE Certificate / original certified copy / originally certified sworn affidavit and must be clearly marked with the tender number, description and bidder name.

Please double-check that you have attached all the above documents before submitting your Bid.

Schedules	Description	Submitted – Indicate YES or NO
Schedule 1	Proof of registration with National Treasury Central Supplier Database (CSD).	
Schedule 2	Completed and signed SBD forms	
Schedule 3	IATA /ASATA Licence or Certificate	
Schedule 4	Original cancelled cheque or stamped letter from the bank confirming banking details	
Schedule 5	Pricing schedule and B-BBEE Verification Certificate (must be submitted in a separate sealed envelope)	
Schedule 6	Three (3) relevant written testimonials from clients	
Schedule 7	Methodology and project approach	
Schedule 8	Initialled Bid Document (each page of this bid document must be initialled)	

TERMS OF REFERENCE

REQUEST FOR PROPOSAL FOR THE PROVISION OF TRAVEL MANAGEMENT AND RELATED SERVICES

1. INTRODUCTION

The Construction Education and Training Authority (CETA) is a Schedule 3A Public Entity established in terms of the Skills Development Act, No.97 of 1998. It exists primarily to facilitate training and skills development in the construction sector within the context of the National Qualification Framework (NQF).

2. SCOPE OF WORK

Successful bidder is expected to achieve the following:

- A. Provide CETA with offsite travel management services that are consistent and reliable and should maintain a high level of traveller satisfaction in line with the service levels.
- B. Support and guide the CETA towards the Introduction /implementation of the Online Booking Tool (OBT)
- C. Achieve significant cost savings for CETA without any degradation in the services.
- D. Appropriately conduct Travel risk assessment and assist the CETA in their Travel related policies and procedures
- E. The Travel Management Company (TMC) will make reservations in line with CETA requests and Travel Policy.
- F. The TMC will create traveller profiles for all travellers and ensure that the information is updated and maintained.
- G. The TMC will be required to provide the CETA with a minimum of three (3) standard monthly reports that are in line with the National Treasury's Cost Containment Instructions reporting template requirements at no cost.

The reporting templates can be found on

<http://www.treasury.gov.za/legislation/pfma/TreasuryInstruction/AccountantGeneral.aspx>

Travel Volumes

Currently the CETA spend +/-R 2.5 million per annum on air travel, accommodation, car hire, conference, etc.

Deliverables under this section include without limitation, the following:

- A. The travel services will be provided to all travellers travelling on behalf of CETA. This will include Accounting Authority members, CETA employees and stakeholders such as contractors and consultants, where the agreement is that CETA is responsible for the arrangement and cost of travel

- B. Facilitate the bookings that are generated through own or third party
- C. Familiarisation with current CETA travel business processes
- D. The TMC must ensure smooth communication with all relevant stakeholders
- E. The TMC may be requested to conduct workshops and training sessions for the Admin and Travel Team of the CETA.

The TMC must provide the following value-added services:

1. Destination information for regional and international destinations
 - Health warnings.
 - Weather forecasts.
 - Visa information.
 - Travel alerts.
 - Location of hotels and restaurant
 - Rules and procedures of the airports.
 - Business etiquette specific to the country.
 - Airline baggage policy.
 - Supplier updates electronic voucher retrieval via web and smart phones. SMS notifications for travel confirmations; Travel audits.
 - Executive services for Executives that include but not limited to check-in support.

Reservations

The Travel Management Company will:

- A. Always endeavour to make the most cost-effective travel arrangements.
- B. Appraise themselves of all travel requirements for destinations to which travellers will be travelling and advise the Traveller of alternative plans that are cost effective and more convenient where necessary.
- C. Obtain a minimum of three (3) price comparisons for all travel requests where the routing or destination permits.
- D. Book the negotiated discounted fares and rates where possible.
- E. Must keep abreast of carrier schedule changes as well as all other alterations and new conditions affecting travel and make appropriate adjustments for any changes in flight schedules prior to or during

- the traveller's official trip. When necessary, e-tickets and billing shall be modified and reissued to reflect these changes.
- F. Book parking facilities at the airports where required for the duration of the travel.
 - G. Respond timeously and process all queries, requests, changes, and cancellations accurately.
 - H. Must be able to facilitate group bookings (e.g. for meetings, conferences, events, etc.)
 - I. Must issue all necessary travel documents, itineraries, and vouchers timeously to traveller(s) prior to departure dates.
 - J. Provide advice to the Traveller of all visa and inoculation requirements well in advance when required.
 - K. Assist with the arrangement of foreign currency and the issuing of travel insurance for international trips when required
 - L. Unless otherwise stated, all cases include domestic, regional, and international travel bookings.
 - M. Negotiated airline fares, accommodation establishment rates, car rental rates, etc, that are negotiated directly or established by National Treasury or by CETA are non-commissionable, where commissions are earned for CETA bookings all these commissions should be returned to CETA monthly.

Car Rental and Shuttle Services

- A. The TMC will book the approved category vehicle in accordance with the CETA Travel Policy with the appointed car rental service provider from the closest rental location (Airport, hotel/conference venue).
- B. The travel consultant should advise the Traveller on the best time and location for collection and return considering the Traveller's specific requirements.
- C. For international travel the TMC may offer alternative ground transportation to the traveller that may include rail, buses, and transfers.
- D. The TMC will book transfers in line with the CETA Travel Policy with the appointed and/or alternative service providers. Transfers can also include coach services.

After Hours and Emergency Services

- A. The TMC must provide a consultant or team of consultants to assist travellers with after hours and emergency reservations and changes to travel plans.
- B. A dedicated consultant/s must be available to assist Executive travellers with after hour or emergency assistance.
- C. After hours' services must be provided from:

- Monday to Friday outside the official hours i.e. from 17h00 to 07h30)
- and twenty-four (24) hours on weekends and Public Holidays.
- D. A call centre facility or after hours contact number should be available to all travellers so that when required, unexpected changes to travel plans can be made and emergency bookings attended to.
- E. The Travel Management Company must have a standard operating procedure for managing after hours and emergency services. This must include purchase order generation of the request within 24 hours

Financial Management

- A. The TMC must implement the rates negotiated by CETA with travel service providers or the discounted air fares, or the maximum allowable rates established by the National Treasury where applicable.
- B. The TMC will be responsible to manage the service provider accounts. This will include the timely receipt of invoices to be presented to CETA for payment within the agreed time period.
- C. Enable savings on total annual travel expenditure and this must be reported and proof provided during monthly and quarterly reviews.
- D. The TMC will be required to offer a **30-day** bill-back account facility to CETA should lodgecard not be offered. 'Bill back', refers to the supplier sending the bill back to the TMC, who, in turn, invoices CETA for the services rendered
- E. TMC to submit reconciled reports for Travel Lodge card statement in case a lodge card is in use.
- F. Where pre-payments are required for smaller Bed & Breakfast /Guest House facilities, these will be processed by the TMC. These are occasionally required at short notice and even for same day bookings.
- G. Consolidate Travel Supplier bill-back invoices.
- H. The TMC is responsible for the consolidation of invoices and supporting documentation to be provided to CETA's Financial Department on the agreed time period (e.g. weekly). This includes attaching the Travel Authorisation or Purchase Order and other supporting documentation to the invoices reflected on the Service provider bill-back report or the Lodge Card statement.
- I. Ensure Travel Supplier accounts are settled timeously

Volume driven incentives

It is important for bidders to note the following when determining the pricing:

1. National Treasury has negotiated non-commissionable fares and rates with various airlines carriers and other service providers;
2. No override commissions earned through CETA reservations will be paid to the TMCs;



3. An open book policy will apply, and any commissions earned through the CETA volumes will be reimbursed to CETA.
4. TMCs are to book these negotiated rates or the best fare available, whichever is the most cost effective for the institution.

The bidder is required to ensure that their submissions are of good quality and provide innovative solutions to the CETA.

3. DURATION OF THE CONTRACT

It is envisaged that the project will be from appointment for a period **three (3) years**.



4. PRICING SCHEDULE

Refer to Annexure A

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Signature

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Date

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Position

.....

Name of Bidder

5. EVALUATION CRITERIA

Criterion 1 – Compulsory Requirements

Bidders will first be evaluated in terms of the gatekeeper/minimum requirements on page 2 of this document. Bidders who do not fulfil all the requirements or do not submit the required documents will be disqualified. Those who fulfil all the requirements or have submitted the required documents will be further evaluated on functionality.

Criterion 2 – Functionality

Functionality is worth 100 points. The minimum threshold is 70 points. Bidders who score less than 70 points on functionality will therefore be disqualified. Those who score 70 points or more will be further evaluated in terms of price and preference points (i.e. on the B-BBEE status level of contributor). The functionality evaluation is broken down as follows:

No	Evaluation Criteria	Past Relevant Experience (Attach reference letters for similar services rendered - on client's letterhead and signed off Please note the following: Bidders must have specific experience and submit at least three recent references in respect of similar services. the references must be in the form of written proof (s) on the referees' letterheads. The references must include the relevant contact person, nature of service, contract amount, commencement date, telephone number, fax number, email addresses.		Total – 5 points
1.	Reference Letters	Submission of three (3) and more written testimonials demonstrating provable experience in Travel Management services	Submission of three (3) or more written	5 points

		Submission of two (2) written testimonials demonstrating provable experience in Travel Management Services services	testimonials in similar projects	3 points
		Submission of one (1) written testimonial demonstrating provable experience in Travel Management services		2 points
		Methodology and Project Approach		Total – 95 points
2	Organisational experience and capacity	Methodology approach in line with the deliverables and the value adds. The Service Provider must provide the following: Company Profile indicating qualified personnel to undertake the travel service requirements; (Please provide detailed CVs of key personnel to be allocated to the CETA) Years of Experience: 0 years=0 points 1 years=1 point 2 years=2 points 3 years=3 points 4 years=4 points 5 years and more = (10 points) The Bidder must: Indicate how a bill back facility will be supported by the travel agent(5 Points)	Registered Accountant's, Attorney's or the business banker for the company certifying the period of operation relevant to Travel Management Services	15 points

3	The ability and flexibility to provide the required travel services	The service provider must provide a fit for purpose project plan which addresses the following: Ability to provide a 30-day account service to the CETA = (5 Points) Indicate how a bill back facility will be supported by the travel agent (5 Points) Demonstrate the ability to work with tight time frames and turnaround times Emergency Bookings (3hrs minimum) = (10 points) 12 hrs-24 hrs = 8 points After 24hrs=0 points		20points
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	Travel Management Implementation Methodology	The bidder must submit a project plan breakdown demonstrating the Implementation methodology which must include the following: -How the work will be managed(10 points) -Process and workflows (10 points) How the travel agent will deal with crisis management (5 points) -After hours customer service (5 Points) -Ability to maintain proper record keeping for Audit purposes (10 Points) - Ability to provide value added services: ▪ Health warnings. – (1 point) ▪ Weather forecasts. – (1 point) ▪ Assist with the Visa Application Process (1 point) ▪ Travel alerts; – (1 point) ▪ Location of hotels and restaurant (1 Point) ▪ Rules and procedures of the airports-(1 Points) ▪ Business etiquette specific to the country- (1 Points) ▪ Airline baggage policy (1 Point) • Supplier updates electronic voucher retrieval via web and smart phones; SMS notifications for travel confirmations (1 Point) • Global Travel Risk Management (1 point)		50 Points
4	Due Diligence/Site Visit		Total Points	

	The CETA will conduct a due diligence and the following will be assessed ▪ Office Space based at the business address submitted during their bid submission ▪ Call Centre Functionality ▪ Validation of the services rendered ▪ Valid Agreements for possible partnerships relevant to the service.	10 Points
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Criterion 3 – Price and Preference Evaluation

Those who score 70 points or more on functionality, will be further evaluated in terms of Price and Preference points (B-BBEE status level of contributor) 80/20 system will be used. As per the table below, price is evaluated over 80 points and preference points over 20:

B-BBEE Status Level of Contributor	Number of points (80/20 system)
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

Whilst CETA is issuing this invitation in good faith, it reserves the right to cancel or delay the selection process at any time without providing reasons therefore, and reserves the right not to select any of the respondents to this invitation.

DUE DILIGENCE

Recommended bidder will be subjected to due diligence.

The above terms of reference, were approved for issuing by:

Signature:  Date: 04 October 2021.....

PART A

INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (<i>Construction Education and Training Authority</i>)					
BID NUMBER:	04-2021/2022	CLOSING DATE:	25 October 2021	CLOSING TIME:	11:00
DESCRIPTION	<i>Request for proposal for the provision of travel management services for Construction Education and Training Authority for a period up to 2024</i>				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
CETA OFFICES @ TCM Building					
52 on 14th Road, Noordwyk					
Midrand, 1687					
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	scmtenders@ceta.co.za		E-MAIL ADDRESS	scmtenders@ceta.co.za	
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



B-BBEE STATUS LEVEL	TICK APPLICABLE BOX]	B-BBEE STATUS LEVEL	[TICK APPLICABLE BOX]
VERIFICATION CERTIFICATE	☐ Yes ☐ No	SWORN AFFIDAVIT	☐ Yes ☐ No

[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]

ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES / WORKS OFFERED?	☐Yes ☐No [IF YES ENCLOSE PROOF]	YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES/WORKS 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, 2017, 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 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:

SBD 4

DECLARATION OF INTEREST

1. Any legal person, including persons employed by the state¹, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes an advertised competitive bid, a limited bid, a proposal or written price quotation). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where-

- the bidder is employed by the state; and/or
- the legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.

2. **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**

2.1 Full Name of bidder or his or her representative:

2.2 Identity Number:.....

2.3 Position occupied in the Company (director, trustee, shareholder², member):
.....

2.4 Registration number of company, enterprise, close corporation, partnership agreement or

trust:.....

2.5 Tax Reference Number:

2.6 VAT Registration Number:

2.6.1 The names of all directors / trustees / shareholders / members, their individual identity numbers, tax reference numbers and, if applicable, employee / PERSAL numbers must be indicated in paragraph 3 below.

¹“State” means –

- (a) any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);
- (b) any municipality or municipal entity;
- (c) provincial legislature;
- (d) national Assembly or the national Council of provinces; or
- (e) Parliament.

²“Shareholder” means a person who owns shares in the company and is actively involved in the management of the enterprise or business and exercises control over the enterprise.

2.7 Are you or any person connected with the bidder **YES / NO**
presently employed by the state?

2.7.1 If so, furnish the following particulars:

Name of person / director / trustee / shareholder/ member:

Name of state institution at which you or the person
connected to the bidder is employed :

Position occupied in the state institution:

Any other particulars:
.....

.....
.....

2.7.2 If you are presently employed by the state, did you obtain **YES / NO**
the appropriate authority to undertake remunerative
work outside employment in the public sector?

2.7.2.1 If yes, did you attach proof of such authority to the bid **YES / NO**
document?

(Note: Failure to submit proof of such authority, where
applicable, may result in the disqualification of the bid.

2.7.2.2 If no, furnish reasons for non-submission of such proof:

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

2.8 Did you or your spouse, or any of the company's directors/ **YES / NO**
trustees / shareholders / members or their spouses conduct
business with the state in the previous twelve months?

2.8.1 If so, furnish particulars:

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

2.9 Do you, or any person connected with the bidder, have **YES / NO**
any relationship (family, friend, other) with a person
employed by the state and who may be involved with
the evaluation and or adjudication of this bid?



2.9.1 If so, furnish particulars.

.....

.....

.....

2.10 Are you, or any person connected with the bidder,
aware of any relationship (family, friend, other) between
any other bidder and any person employed by the state
who may be involved with the evaluation and or adjudication
of this bid?

YES/NO

2.10.1 If so, furnish particulars.

.....

.....

.....

2.11 Do you or any of the directors / trustees / shareholders / members
of the company have any interest in any other related companies
whether or not they are bidding for this contract?

YES/NO

2.11.1 If so, furnish particulars:

.....

.....

.....

3 Full details of directors / trustees / members / shareholders.

Full Name	Identity Number	Personal Income Tax Reference Number	State Employee Number/Persal Number



4 DECLARATION

I, THE UNDERSIGNED (NAME).....

CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature

.....
Date

.....
Position

.....
Name of Bidder

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

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

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

1. GENERAL CONDITIONS

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

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- a) The value of this bid is estimated to be less than R50 000 000 (all applicable taxes included) and therefore the 80/20 preference point system shall be applicable; or
- b) The 80/20 preference point system will be applicable to this tender

1.2 Points for this bid shall be awarded for:

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

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

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

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

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

2. DEFINITIONS

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



3. POINTS AWARDED FOR PRICE

3.1 THE 80/20 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

$$P_s = 80 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right) \quad \text{or} \quad P_s = 90 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

Where

P_s = Points scored for price of bid under consideration

P_t = Price of bid under consideration

$P_{\min}$ = Price of lowest acceptable bid

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

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

B-BBEE Status Level of Contributor	Number of points (90/10 system)	Number of points (80/20 system)
1	10	20
2	9	18
3	6	14
4	5	12
5	4	8
6	3	6
7	2	4
8	1	2
Non-compliant contributor	0	0



5. BID DECLARATION

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

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

6.1 B-BBEE Status Level of Contributor: . =(maximum of 10 or 20 points)

(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 4.1 and must be substantiated by relevant proof of B-BBEE status level of contributor.

7. SUB-CONTRACTING

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

(*Tick applicable box*)

YES		NO	
-----	--	----	--

7.1.1 If yes, indicate:

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

(*Tick applicable box*)

YES		NO	
-----	--	----	--

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

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

Any QSE		
---------	--	--

8. DECLARATION WITH REGARD TO COMPANY/FIRM

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

8.2 VAT registration number:.....

8.3 Company registration number:.....

8.4 TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One person business/sole propriety
- ☐ Close corporation
- ☐ Company
- ☐ (Pty) Limited

[TICK APPLICABLE BOX]

8.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

.....

8.6 COMPANY CLASSIFICATION

- ☐ Manufacturer
- ☐ Supplier
- ☐ Professional service provider
- ☐ Other service providers, e.g. transporter, etc.

[TICK APPLICABLE BOX]

8.7 Total number of years the company/firm has been in business:.....

8.8 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBE status level of contributor indicated in paragraphs 1.4 and 6.1 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I / we acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 6.1, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;
- iv) If the B-BBEE status level of contributor has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –
 - (a) disqualify the person from the bidding process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution.

WITNESSES

- 1.
- 2.

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

DATE:

ADDRESS

.....

.....

CONTRACT FORM - RENDERING OF SERVICES

THIS FORM MUST BE FILLED IN DUPLICATE BY BOTH THE SERVICE PROVIDER (PART 1) AND THE PURCHASER (PART 2). BOTH FORMS MUST BE SIGNED IN THE ORIGINAL SO THAT THE SERVICE PROVIDER AND THE PURCHASER WOULD BE IN POSSESSION OF ORIGINALLY SIGNED CONTRACTS FOR THEIR RESPECTIVE RECORDS.

PART 1 (TO BE FILLED IN BY THE SERVICE PROVIDER)

1. I hereby undertake to supply all or any of the goods and/or works described in the attached bidding documents to CETA in accordance with the requirements and specifications stipulated in bid number..... at the price/s quoted. My offer/s remain binding upon me and open for acceptance by the purchaser during the validity period indicated and calculated from the closing time of bid.

2. The following documents shall be deemed to form and be read and construed as part of this agreement:
 - (i) Bidding documents, viz
 - Invitation to bid;
 - Tax clearance certificate;
 - Pricing schedule(s);
 - Technical Specification(s);
 - Preference claims for Broad Based Black Economic Empowerment Status Level of Contribution in terms of the Preferential Procurement Regulations 2011;
 - Declaration of interest;
 - Declaration of bidder's past SCM practices;
 - Certificate of Independent Bid Determination
 - Special Conditions of Contract;
 - (ii) General Conditions of Contract; and
 - (iii) Other (specify)

3. I confirm that I have satisfied myself as to the correctness and validity of my bid; that the price(s) and rate(s) quoted cover all the goods and/or works specified in the bidding documents; that the price(s) and rate(s) cover



all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.

4. I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this agreement as the principal liable for the due fulfilment of this contract.
5. I declare that I have no participation in any collusive practices with any bidder or any other person regarding this or any other bid.
6. I confirm that I am duly authorised to sign this contract.

NAME (PRINT)

CAPACITY

SIGNATURE

NAME OF FIRM

DATE

SBD 7.2

CONTRACT FORM - RENDERING OF SERVICES

PART 2 (TO BE FILLED IN BY THE PURCHASER- CETA)

I..... in my capacity as.....

accept your bid under reference number dated.....for the rendering of services

WITNESSES

1

2.

DATE:



indicated hereunder and/or further specified in the annexure(s).

An official order indicating service delivery instructions is forthcoming.

I undertake to make payment for the services rendered in accordance with the terms and conditions of the contract, within 30 (thirty) days after receipt of an invoice.

DESCRIPTION OF SERVICE	PRICE (ALL APPLICABLE TAXES INCLUDED)	COMPLETION DATE	B-BBEE STATUS LEVEL OF CONTRIBUTION	MINIMUM THRESHOLD FOR LOCAL PRODUCTION AND CONTENT (if applicable)

4. I confirm that I am duly authorised to sign this contract.

SIGNED ATON.....

NAME (PRINT)

SIGNATURE

OFFICIAL STAMP

WITNESSES

1

2

DATE:

DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

- 1 This Standard Bidding Document must form part of all bids invited.
- 2 It serves as a declaration to be used by institutions in ensuring that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system.
- 3 The bid of any bidder may be disregarded if that bidder, or any of its directors have-
 - a. abused the institution's supply chain management system;
 - b. committed fraud or any other improper conduct in relation to such system; or
 - c. failed to perform on any previous contract.
- 4 In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

Item	Question	Yes	No
4.1	Is the bidder or any of its directors listed on the National Treasury's Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector? (Companies or persons who are listed on this Database were informed in writing of this restriction by the Accounting Officer/Authority of the institution that imposed the restriction after the Audi alteram partem rule was applied). The Database of Restricted Suppliers now resides on the National Treasury's website(www.treasury.gov.za) and can be accessed by clicking on its link at the bottom of the home page.	Yes ☐	No ☐

4.1.1	If so, furnish particulars:		
4.2	Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)? The Register for Tender Defaulters can be accessed on the National Treasury's website (www.treasury.gov.za) by clicking on its link at the bottom of the home page.	Yes ☐	No ☐
4.2.1	If so, furnish particulars:		
4.3	Was the bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five years?	Yes ☐	No ☐
4.3.1	If so, furnish particulars:		
4.4	Was any contract between the bidder and any organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	Yes ☐	No ☐
4.4.1	If so, furnish particulars:		

CERTIFICATION



I, THE UNDERSIGNED (FULL NAME).....

CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM IS TRUE AND CORRECT.

I ACCEPT THAT, IN ADDITION TO CANCELLATION OF A CONTRACT, ACTION MAY BE TAKEN AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....

Signature

.....

Date

.....

Position

.....

Name of Bidder

CERTIFICATE OF INDEPENDENT BID DETERMINATION

This Standard Bidding Document (SBD) must form part of all bids¹ invited.

- 2 Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by, firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging).² Collusive bidding is a *pe se* prohibition meaning that it cannot be justified under any grounds.
- 3 Treasury Regulation 16A9 prescribes that accounting officers and accounting authorities must take all reasonable steps to prevent abuse of the supply chain management system and authorizes accounting officers and accounting authorities to:
 - a. disregard the bid of any bidder if that bidder, or any of its directors have abused the institution's supply chain management system and or committed fraud or any other improper conduct in relation to such system.
 - b. cancel a contract awarded to a supplier of goods and services if the supplier committed any corrupt or fraudulent act during the bidding process or the execution of that contract.
- 4 This SBD serves as a certificate of declaration that would be used by institutions to ensure that, when bids are considered, reasonable steps are taken to prevent any form of bid-rigging.
- 5 In order to give effect to the above, the attached Certificate of Bid Determination (SBD 9) must be completed and submitted with the bid:

¹ Includes price quotations, advertised competitive bids, limited bids and proposals.

² Bid rigging (or collusive bidding) occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and / or services for purchasers who wish to acquire goods and / or services through a bidding process. Bid rigging is, therefore, an agreement between competitors not to compete.



SBD 9

CERTIFICATE OF INDEPENDENT BID DETERMINATION

I, the undersigned, in submitting the accompanying bid:

(Bid Number and Description)

in response to the invitation for the bid made by:

(Name of Institution)

do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of: _____ that:

(Name of Bidder)

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign the bid, on behalf of the bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:

(a) has been requested to submit a bid in response to this bid invitation;

- (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
 - (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder
- 6. 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 consortium³ will not be construed as collusive bidding.
- 7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
 - (a) prices;
 - (b) geographical area where product or service will be rendered (market allocation)
 - (c) methods, factors or formulas used to calculate prices;
 - (d) the intention or decision to submit or not to submit, a bid;
 - (e) the submission of a bid which does not meet the specifications and conditions of the bid;or
 - (f) bidding with the intention not to win the bid.
- 8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 9. 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 **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.**

- 10. 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.

.....
Signature

.....
Date

.....
Position

.....
Name of Bidder