NATIONAL YOUTH DEVELOPMENT AGENCY
OUR YOUTH. OUR FUTURE.

REQUEST FOR QUOTATION (RFQ)

To:	**All participating bidders**	**From NYDA**	**Mmabatho Tseko**
Date:	**26/11/2026**	**Number of Pages**	**22**
Contact details	**087 158 6378**	**Mmabatho.Tseko@nyda.gov.za**	
Project description	**Procurement of Software License and Support Services**		
RFQ number	**RFQ2026/142-06483/NYDA**		

CLOSING DATE: 02/12/2026 at 17:00
SUBMISSION EMAIL ADDRESS: Quotations2@nyda.gov.za

Issued by:
National Youth Development Agency
7 Naivasha Road
Sunninghill
2191

Name of Bidder: ……

ADDRESS : ……

LAND LINE : …….. Cell No: ……

EMAIL: ……

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PART A
INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (*NAME OF DEPARTMENT/ PUBLIC ENTITY*)					
BID NUMBER:	RFQ2026/142-06483/NYDA	CLOSING DATE:	02 December 2026	CLOSING TIME:	17:00
DESCRIPTION	**Request for Quotation – Software License and Support Services**				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT *(STREET ADDRESS)*					
NATIONAL YOUTH DEVELOPMENT AGENCY					
7 NAIVASHA ROAD					
SUNNINGHILL					

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO		**TECHNICAL ENQUIRIES MAY BE DIRECTED TO:**	
CONTACT PERSON	**Quotations2**	CONTACT PERSON	**Mmabatho Tseko**
TELEPHONE NUMBER	**087 158 6345**	TELEPHONE NUMBER	**087 158 6378**
FACSIMILE NUMBER		FACSIMILE NUMBER	
E-MAIL ADDRESS	**Quotations2@nyda.gov.za**	E-MAIL ADDRESS	**Mmabatho.Tseko@nyda.gov.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 VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] ☐ Yes ☐ No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		[TICK APPLICABLE BOX] ☐ 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]	***ARE YOU A FOREIGN BASED SUPPLIER FOR** THE GOODS /SERVICES /WORKS OFFERED?*	☐Yes ☐No [IF YES, ANSWER PART THE QUESTION BELOW]

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: ……..

A. ADMINISTRATIVE COMPLIANCE

	QUOTATION DATA
1.	**EVALUATION PROCESS**
1.1	**<u>STAGE ONE:</u>** **ADMINISTRATION COMPLIANCE**
1.1.1	All quotes will be evaluated to determine compliance with quotation requirements and conditions. Quotes with obvious deviations from the requirements/conditions, will be eliminated from further adjudication. (a) Eligibility/mandatory requirements Quotes will only be compliant if bidder has submitted the following documents: • A proof that the bidder is in good standing with SARS. Such information will be verified through Central Supply Database (CSD) or using SARS efiling pin **prior** to the award of the bid. • SBD1 - Invitation to bid • SBD 4 (Bidders Disclosure) - A completed and duly signed declaration of Interest. Should a conflict of interest be declared or identified, the bid would be declared non-responsive • A completed and signed pricing schedule using the template provided. **Failure to provide any mandatory information required will results in the submission being considered non-responsive**
1.2	**<u>STAGE TWO</u>** **PRICE AND SPECIFIC GOALS** In order for the bidder to claim specific goals: • The bidder must indicate how they claim points for each preference point system in the SBD 6,1 form, and; • A BBBEE Certificate/Sworn Affidavit must be attached. **Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.**
1.2.1	Price and Specific Goals evaluation will only be done to bidders who went pass Stage 1
1.3	**ADJUDICATION OF BID**
1.3.1	The bid shall be awarded at the sole and absolute discretion of NYDA. NYDA hereby represents that it is not obliged to award this bid to any bidder. NYDA is entitled to **retract** this bid at any time as from the date of issue and is not obliged to award this bid to the bidder that quotes the lowest.

	QUOTATION DATA
1.3.2	A bidder shall be disqualified from bidding if any attempt is made either directly to solicit and/or canvass any information from any employee or agent of NYDA regarding this bid from the date the offer is submitted until the date of award of the bid.
1.4	**Awarding of contract**
1.4.1	This is the final stage of the evaluation process and will be based on the PPPFA Preference Point System of 80/20 where Price will amount to 80 points, and specific goals will amount to 20 points. The award of business will be made to a bidder who has scored the highest overall points for this stage of the evaluation, unless objective criteria exist, justifying an award to another bidder
1.4.2	NYDA reserves the right to award this bid in full or in Part.
1.4.3	**No service rendered or delivery to be made without a purchase order. Services rendered or goods delivered without a purchase order will not be paid for.**
1.4.4	**NB: SHOULD THE APPOINTED SERVICE PROVIDER DECIDE TO OUTSOURCE THE SERVICES OR WORK UNDER THIS RFQ, THEY MUST ENSURE THAT THEY DO NOT APPOINT A PERSON OR COMPANY OWNED BY A PERSON WORKING FOR THE STATE.** **FAILURE TO ADHERE TO THIS CLAUSE WILL LEAD TO DISQUALIFICATION AND CANCELLATION OF PURCHASE ORDER AND OR CONTRACT**

B. Terms of Reference

THE NYDA HEREBY INVITES YOU TO SUBMIT A PRICE QUOTATION FOR SOFTWARE LICENCES AND SUPPORT SERVICES

1. BACKGROUND ON THE PROJECT

1.1. NYDA Key Challenges and Needs

The National Youth Development Agency (NYDA) is a South African-based agency established primarily to tackle challenges that the nation's youth are faced with. To be able to address these challenges, NYDA needs a robust, redundant, reliable, scalable, secure, future-proof, and flexible customer service solution for the agency. The service provider must propose a solution that has the right blend of technology depth, process and skills to be the partner of choice for NYDA to meet its strategic business and functional needs.

1.2. NYDA Desired Outcome

NYDA is looking to have a consolidated solution that will be able to provide a fully managed solution around Customer Service. This must be able to reduce costs of services from a capital expenditure, whilst allowing NYDA to conduct business in an environment that caters to their business requirement.

1.3. Duration of the Service required.

The Service must be provided from the 14th of December 2026 – 13th May 2027.

2. PURPOSE AND OBJECTIVES OF THIS RFP

NYDA seeks to appoint a service provider to supply software licences, support services, and enhance the existing Genesys Cloud-based Customer Service solution for Head Office contact centre personnel. The selected service provider will provide comprehensive professional services to improve customer service operations, integrate seamlessly with the existing ERP system, and leverage advanced analytics and automation. The goal of this project is to enhance the overall customer experience at NYDA by optimising the current Genesys platform, streamlining workflows, and ensuring continued innovation and operational efficiency.

NYDA currently operates a Genesys Cloud-based contact centre platform as its established customer service technology foundation. To protect prior investment, minimise migration risk, and ensure continuity of operations, this RFP is limited to bidders who are certified Genesys Cloud partners and capable of enhancing and supporting the existing platform.

3. SCOPE

The Genesys Cloud-based Customer Service solution must consider NYDA's strategic goals which would address most of the business and functional requirements. The Genesys Cloud Contact Centre solution must cater to improved redundancy and scalability. The provision of managed solutions geared to meet security, cost-effectiveness, scalability, and high productivity solutions.

3.1.1 Real-Time Assistance:

- The system shall provide real-time assistance to agents in real time during both voice and digital interactions.
- The system shall recommend the next best action using the AI capabilities and knowledge base to assist the agents.
- Support live escalation from self-service channels to agents without loss of interaction context.

3.1.2 Quality Assurance and Compliance:

- Support a standardised and automated evaluation framework across all channels for monitoring agent performance and service quality.
- Align evaluation criteria with business KPIs, compliance standards, and customer experience metrics.
- Leverage AI-driven scoring, risk detection, and trend analytics for quality and compliance management.
- Provide voice and screen recording capabilities, with secure storage and retrieval for audits.
- Enable supervisors to review, validate, and report on automated evaluation results, ensuring accountability and compliance.

3.1.3 Automation and AI Capabilities:

- The business requires AI capability, including chatbots and voicebots, across all supported customer interaction channels (e.g. WhatsApp, web chat, IVR), capable of handling routine inquiries, providing contextual responses, and escalating complex cases to human agents where appropriate.
- The chatbots will be used for FAQs, application tracking and status with integration to ERP.
- Support dynamic orchestration between self-service and live agents, ensuring seamless continuity of context.
- Integration with existing backend systems (ERP) is required enabling the chatbots to access and update relevant customer and transaction data in real time to support both self-service and automated task execution.

3.1.4 Multichannel and Omnichannel Support:

- Support for various communication channels, including voice, text/SMS, social media, messaging apps, chats, and email.

- Omnichannel capabilities for seamless customer support across preferred channels.

3.1.5 Campaign Management

- Enable targeted customer campaigns to improve satisfaction, and engagement outcomes.

3.1.6 Reporting and Analytics:

- Robust reporting and analytics capabilities to provide insights into customer interactions, service performance, and agent productivity.

- Customizable dashboards and reporting tools for data-driven decision-making.
- The system shall provide access to transcribed voice interactions for reporting and analysis purposes.

3.1.7 Configuration and Scalability:

- Easy-to-use configuration tools for customizing workflows, routing rules, and automation processes.
- Scalable solution to accommodate changing business needs.

3.1.8 Support Services

The bidder must provide detailed information on their support contact centre, demonstrating capability to deliver ongoing operational, technical, and escalation support for the Genesys Cloud-based Customer Service solution. The details must include the below:

- Support structure (levels, teams, roles, responsibilities)
- Hours of operation and availability for business-critical support
- Escalation procedures for urgent and complex issues
- Response and resolution time commitments (SLAs)
- Tools and processes used for issue tracking, monitoring, and reporting
- Reporting and governance mechanisms for performance monitoring and continuous
- improvement

3.1.9 Training

- The bidder shall provide comprehensive training for all NYDA contact centre agents, receptionists, and branch personnel on the Genesys Cloud-based Customer Service solution, including all newly implemented features and enhancements.
- The training program shall include:
- Role-based curriculum for agents, supervisors, and administrators.
- Hands-on practical sessions covering workflows, routing, AI-assisted interactions, omnichannel handling, and automation tools.
- Branch-level training to ensure local staff understand branch-specific routing, numbers, and operational workflows.
- Training manuals
- The bidder shall provide post-training support and refresher sessions to reinforce learning, address knowledge gaps, and ensure agents can effectively leverage new features in day-to-day operations.

4. FUNCTIONAL REQUIREMENTS / KEY FEATURES:

4.1 Interaction Management

The system shall:

- Support inbound and outbound interactions across voice and digital channels
- Generate a unique interaction/ticket reference number for every customer interaction
- Maintain a full interaction history across all channels
- Enable agents to view customer interaction history in real time

4.2 Routing and Queuing

The system shall:
- Provide skills-based and rules-based routing
- Route interactions based on:
- customer data (from ERP)
- interaction type
- channel
- priority
- Support queue prioritisation and overflow handling
- Enable branch-level routing logic

4.3 Omnichannel Capabilities

The system shall:
- Support the following channels:
- Voice
- Email
- WhatsApp
- Web chat
- SMS
- Social Media
- Provide a single unified agent interface for all channels
- Maintain context continuity when switching channels

4.4 Agent Desktop

The system shall:
- Provide a web-based agent interface
- Display: customer details (via ERP integration)
- Interaction history
- Active queue status
- Enable: call control (hold, transfer, conference)
- Disposition/wrap-up codes
- Support AI-assisted recommendations (next best action)

4.5 IVR and Self-Service

The system shall:
- Provide configurable IVR menus
- Support:
- DTMF and voice input
- Integrate with backend systems (ERP) for:
- information retrieval
- transaction handling
- Enable escalation to the agent with full context

4.6 Automation and AI

The system shall:
- Support chatbots and voicebots
- Handle routine queries via automation
- Enable seamless handover to agents

- Provide: intent recognition contextual responses
- Support integration with backend systems for real-time data access

4.7 Quality Management and Recording

The system shall:
- Record 100% of interactions (voice and digital, where applicable)
- Retain recordings for a minimum of 12 months
- Provide: screen recording
- playback and search functionality
- Support: automated quality scoring
- manual evaluation workflows

4.8 Reporting and Analytics

The system shall:
- Provide real-time dashboards for:
- queue performance
- agent performance
- Support historical reporting on:
- volumes
- SLAs
- Trends
- Provide customisable reports
- Enable access to interaction transcripts (voice + digital)

4.9 Campaign Management (Optional / Advanced)

The system should:
- Enable outbound campaigns (if required in future)
- Support:
- customer segmentation
- automated engagement triggers
- Use behavioural and interaction data for targeting

4.10 Administration and Configuration

The system shall:
- Provide low-code / no-code configuration tools
- Enable administrators to:
- configure routing rules
- manage users and roles
- modify workflows
- Support role-based access control (RBAC)

5. OPERATIONAL DETAILS:

- **Operating Times of the Call Centre:**

The Call Centre operates from 8:00 AM to 5:00 PM, Monday to Friday, with office hours scheduled.

- **Number of licences for Supervisors and Agents Required:**

The contact centre currently consists of 16 dedicated named agents based at Head Office. Head Office
agents are responsible for handling both inbound and outbound interactions.

- **Call volumes for the last 6 months:**

Month	Inbound Call Volume
May 26	**1420**
June 26	**1758**
July 26	**1721**
Aug 26	**1524**
Sep 26	**1536**
Oct 26	**2101**
Total	**10 060**

- **Inbound Requirements:**

  - **Number of Queues**:

The call centre primarily functions as an inbound call centre; therefore, the number of queues depends on the specific call routing requirements. It's recommended to have separate queues for different types of inquiries or services for effective call handling.

  - **Call/Interaction Flows:**

The specific call and interaction flows will be designed according to the organization's requirements. The number of flows depends on the types of services and inquiries that need to be addressed.

- **Current ERP Solution and Integration:**

  - The ERP system in use is Open-Source Odoo, and it is in-house developed.
  - The organization expects the contact centre solution to integrate with the ERP through APIs.

These APIs will facilitate the exchange of data and information between the call centre system and the ERP. Currently the youth details and application status are retrieved from the ERP system to identify the youth record in real time.

- **Outbound Requirements:**

  - There is an outbound team that deals with abandoned calls as well as scheduled callbacks.
  - Specific dialling modes are required.
  - Dialling lists are required for outbound campaigns.
  - Automatically clear completed callbacks.

- **Recording:**

  - Recording is required for all agents.
  - The retention period for call recordings is one year.

Month Inbound Call Volume

- **IVR:**
    - **Call Handling:**

The IVR must efficiently handle incoming calls, providing callers with a menu of options to direct their inquiries to the appropriate department or service. This will help streamline the call centre's operations and ensure that callers are directed to the right resources without the need for human intervention.

- **User Interaction:**

IVR systems allow callers to interact with the system by using their phone's keypad or voice commands. This user interaction is crucial for guiding callers to their desired destination and for providing a user-friendly experience.

- **Information Retrieval:**

IVR can access databases and provide information to callers. For example, it can check account balances, provide order status, or offer automated updates. In your case, having information retrieval capabilities can be useful for addressing common customer inquiries without the need for live agent intervention.

- **Work Facilities:**

    - Agents are located at the head office.
    - The organization has provided laptops and 3G SIM cards for customer services staff.
    - Agents have sufficient internet access for connecting to the cloud solution.

- **Reporting:**

    - Reporting requirements include comprehensive reports that are data-driven and flexible for any
    - alterations.
    - Reporting should cover workforce reports, traffic, and trends, and be able to pull reports for all
    - communication channels integrated into the proposed system.
    - Business Intelligence (BI) reports may also be needed for in-depth analysis and decision making.

C. Price schedule

DESCRIPTION	Period	PRICE PER UNIT	TOTAL PRICE EXCLUDING VAT
Genesys Cloud Contact Centre System with Software license for 5 months	16	R	R
System Support for 5 months	01-24 Hours	R	R
WhatsApp for Business for 5 months	01 (per usage)	R	R
Total Excluding VAT		R	R
VAT		R	R
Total Including VAT		R	R

COMPANY NAME : _____

SIGNATURE OF BIDDER: _____

CAPACITY : _____

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

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

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

2. Bidder's declaration

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

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

Full Name	**Identity Number**	**Name of State institution**

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

2.2.1 If so, furnish particulars:

……

……

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

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract?

YES/NO

2.3.1 If so, furnish particulars:

……
……

3 DECLARATION

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

3.1 I have read and I understand the contents of this disclosure;

3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;

3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium2 will not be construed as collusive bidding.

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

3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other

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

applicable legislation.

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

TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON

PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN

MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE

FALSE.

……	..……
Signature	Date
……	……
Position	Name of bidder

May 2011

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

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

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

1. GENERAL CONDITIONS

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

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

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

(*delete whichever is not applicable for this tender*).

a) The applicable preference point system for this tender is the 90/10 preference point system.
b) The applicable preference point system for this tender is the 80/20 preference point system.
c) Either the 90/10 or 80/20 preference point system will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

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

(a) Price; and

(b) Specific Goals.

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

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	
SPECIFIC GOALS	
Total points for Price and SPECIFIC GOALS	**100**

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

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

2. DEFINITIONS

(a) **"tender"** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;

(b) **"price"** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;

(c) **"rand value"** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

(d) **"tender for income-generating contracts"** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and

(e) **"the Act"** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

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

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

80/20 **or** **90/10**

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

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

3.2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

3.2.1. POINTS AWARDED FOR PRICE

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

80/20 **or** **90/10**

$$Ps = 80\left(1 + \frac{Pt - P\,max}{P\,max}\right) \quad \text{or} \quad Ps = 90\left(1 + \frac{Pt - P\,max}{Pmax}\right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmax = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

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

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

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

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

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

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

(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.

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

The specific goals allocated points in terms of this tender	Number of points allocated	Number of points allocated	Number of points claimed (90/10 system)	Number of points claimed (80/20 system)

	(90/10 system) (To be completed by the organ of state)	(80/20 system) (To be completed by the organ of state)	(To be completed by the tenderer)	(To be completed by the tenderer)
Youth Owned Institutions		10		
Women Owned Institutions		05		
Ownership by persons with disabilities		05		

DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name of company/firm…….

4.4. Company registration number: ……...

4.5. TYPE OF COMPANY/ FIRM

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

[TICK APPLICABLE BOX]

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

i) The information furnished is true and correct;

ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;

iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;

iv) If the specific goals have been claimed or obtained on a fraudulent basis or

any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –

(a) disqualify the person from the tendering process;

(b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;

(c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;

(d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and

(e) forward the matter for criminal prosecution, if deemed necessary.

	…… **SIGNATURE(S) OF TENDERER(S)**
SURNAME AND NAME:	……..
DATE:	……
ADDRESS:	……
	……
	……
	……