

**SERVICES SETA RFQ DOCUMENT FOR THE APPOINTMENT OF A SERVICE PROVIDER TO FACILITATE PROJECT MANAGEMENT CAPABILITIES AND GRANTS MANAGEMENT WORKSHOP**

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## 1. RFQ CHECKLIST

The contents of the RFQ document must be as follows,

The bidder must submit one proposal(s) electronically ([RFQs@serviceseta.org.za](mailto:RFQs@serviceseta.org.za)) and the USB.

- The Services SETA RFQ documents must be submitted in official format (not to be re-typed);
- The RFQ proposal must be properly bonded, punched, numbered, and separated as per the checklist schedule below.

Schedules	Description	Submitted – YES or NO
Schedule 1	The potential bidder must be registered with National Treasury Central Supplier Database (CSD).	
Schedule 2	RFQ document must be signed and duly completed, together with all declaration of interest/ standard bidding documents ( <b>SBD's 1, 3.1,4, 6.1, 7.1 &amp; 7.2</b> ).	
Schedule 3	Provide and attach a copy of Company Registration Certificate.	
Schedule 4	Entity's proof of affiliation with a recognised Project Management Professional Body	
Schedule 5	ID. Documents, Letter from the Bank Confirming Banking Details	
Schedule 6	Pricing Schedule (Services SETA accept an additional formal quotation)	

## PART A: INVITATION OF QUOTE(S)

SBD 1

YOU ARE HEREBY INVITED TO QUOTE FOR REQUIREMENTS OF THE (NAME OF DEPT/ PUBLIC ENTITY)					
RFQ NUMBER:	RFQC-000579	CLOSING DATE:	07/04/26	CLOSING TIME:	10h00AM
DESCRIPTION	APPOINTMENT OF A SERVICE PROVIDER TO FACILITATE PROJECT MANAGEMENT CAPABILITIES AND GRANTS MANAGEMENT WORKSHOP				
ENQUIRIES DUE DATE	All enquiries regarding this RFQ should be in writing and may be directed at E-mail <a href="mailto:RFQs@serviceseta.org.za">RFQs@serviceseta.org.za</a> by <b>10:00AM</b> on the <b>03/04/2026</b>				
<b>Important to note:</b>					
<ul style="list-style-type: none"> <li>Bidders should ensure that RFQs are submitted electronically/ delivered timeously to the correct address as late submissions will not be accepted for consideration.</li> <li>All RFQs must be submitted on the official forms – (not to be re-typed).</li> </ul>					
<b>NOTE!</b>					
<b>THE RELEVANT BIDDER MUST SIGN IN FULL WHERE REQUIRED AND INITIAL ALL PAGES OF THE SBD FORMS</b>					
<b>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO</b>			<b>TECHNICAL ENQUIRIES MAY BE DIRECTED TO:</b>		
CONTACT PERSON	Eric Mapeta		CONTACT PERSON	Tsheola Matsebe	
TELEPHONE NUMBER	(011) 276 9622		TELEPHONE NUMBER	011 276 9661 011 594 8634	
FACSIMILE NUMBER			FACSIMILE NUMBER		
E-MAIL ADDRESS	<a href="mailto:RFQs@serviceseta.org.za">RFQs@serviceseta.org.za</a>		E-MAIL ADDRESS	SibongileMF@serviceseta.org.za	
<b>SUPPLIER INFORMATION</b>					
NAME OF BIDDER					
CONTACT PERSON			CONTACT PERSON		
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>BANK NAME</b>			<b>BANK ACCOUNT NUMBER</b>		
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]	
<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

**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 OF QUOTE(S) PROCESS**

**QUOTE(S) 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 OF 2000 AND ITS REGULATION OF 2022, 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).**

**TAX COMPLIANCE REQUIREMENTS**

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

**NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE QUOTE(S) INVALID.**

SIGNATURE OF BIDDER: .....

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

DATE: .....

### 3. TERMS OF REFERENCE/ SPECIFICATION

#### 1. PURPOSE OF THIS PROJECT

#### APPOINTMENT OF A SERVICE PROVIDER TO FACILITATE PROJECT MANAGEMENT CAPABILITIES AND GRANTS MANAGEMENT WORKSHOP

#### INTRODUCTION AND OVERALL OBJECTIVES

The Services Sector Education and Training Authority (Services SETA) was established and registered in March 2000 in terms of the Skills Development Act of 1998. The Services SETA aims to provide for the skills development needs of the services sector through the administration of learning programmes, disbursement of grants and monitoring of education and training.

The Services SETA hereby invites experienced, knowledgeable service providers to submit proposals for facilitation of project management capabilities and grants management workshop.

#### 2. BACKGROUND

The Services SETA has established a Project Management Support function to strengthen governance, monitoring and impactful delivery of discretionary grant projects. As part of this initiative, Services SETA is planning a one-day workshop in the week of 24-28 March 2026 to engage with key stakeholders in the grant management value chain. The workshop aims to unpack SETAs' discretionary grants implementation processes to identify operational inefficiencies and associated implementation risks and recommend a way forward that will ensure maximum impact of discretionary grants funding.

#### 3. SCOPE OF WORK/ DELIVERABLES

- Facilitate one-day interactive physical workshop for approximately 100 participants.
- Ensure the workshop is a blend of legislative requirements, theoretical input and practical experience
- Manage group dynamics and ensure active respectful participation from all attendees
- Workshop transcripts and reports with recommendations within 7 days post-workshop

#### 4. THE DURATION OF ASSIGNMENT

It is envisaged that the project will be a once off.

**5. KINDLY FORWARD THE FOLLOWING RFQ DOCUMENTS, WHERE A CERTIFIED COPY OF A DOCUMENT IS REQUIRED, IT MUST BE CERTIFIED WITHIN THE LAST SIX (6) MONTHS**

**DOCUMENT(S) REQUIRED**

**QUALIFICATION/ GATEKEEPER REQUIREMENT (MANDATORY)**

	Tick(Has applicable document attached?)	
1. The potential bidder must be registered with National Treasury Central Supplier Database (CSD).	Yes <input type="checkbox"/>	No <input type="checkbox"/>
2. RFQ document must be signed and duly completed, together with all declaration of interest/ standard bidding documents ( <b>SBD's 1, 3.3, 4, 6.1, 7.1 &amp; 7.2</b> ).	Yes <input type="checkbox"/>	No <input type="checkbox"/>
3. Provide and attach a copy of Company Registration Certificate	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4. Entity's proof of affiliation with a recognised Project Management Professional Body	Yes <input type="checkbox"/>	No <input type="checkbox"/>

**The bidder(s) must comply with the qualification requirements above. Failure to abide by any of the requirements will lead to automatic disqualification.**

**SERVICES SETA PROMOTION OF THE SPECIFIC GOAL(S) (NON-MANDATORY)**

Bidders who do not submit supporting documents to claim for the specific goal(s) will not be disqualified but will score Zero (0) for 20 points elements.	Weighted Points	Tick (Has applicable document attached?)	
1. More than 51% Black Owned Entity	2	Yes <input type="checkbox"/>	No <input type="checkbox"/>
2. Female Owned Entity	7	Yes <input type="checkbox"/>	No <input type="checkbox"/>
3. Youth Owned Entity	8	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4. Disabled Owned Entity	1	Yes <input type="checkbox"/>	No <input type="checkbox"/>
5. Skills Transfer and Development 6. (Attach a proof of client reference letter/ project(s) indicating skills transfer conducted).	2	Yes <input type="checkbox"/>	No <input type="checkbox"/>

**Note: In order to claim points for the specific goal(s) the bidders must submit a valid BEE certificate/ BEE Sworn Affidavit, Skills Transfer, CSD Report document(s) to substantiate the specific goals point(s) claimed).**

**OTHER IMPORTANT REQUIREMENT (NON-MANDATORY)**

7. The tenderer must submit proof of its B-BBEE status level of contributor	Yes <input type="checkbox"/>	No <input type="checkbox"/>
8. An <b>objective criterion</b> may be used during evaluation of pricing.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
9. The Supplier CIPC status must be active, when verifying with Central Supplier Database (CSD). Provide MAAA number .....	Yes <input type="checkbox"/>	No <input type="checkbox"/>
10. Tax Clearance certificate Verification purposes, the potential bidder must indicate pin number.....	Yes <input type="checkbox"/>	No <input type="checkbox"/>

### Specific Goals Definitions

<b>Black Owned entities</b>	Black Owned entities (Company must be in the hands of 51% or more black people)
<b>Women</b>	Promote Women owned and empowered enterprises.
<b>Youth</b>	Youth Owned Entities: addressing the needs of Youth people.
<b>Disability</b>	Disabled-owned entities (by empowering disability-impaired entities). A person, with a permanent impairment of a physical, intellectual, or sensory function, which results in restricted, or lack of, ability to perform an activity in the manner, or within the range, considered normal for a human being.
<b>Skills Transfer</b>	The empowerment of the workforce by standardising the level of skill and knowledge of workers.

## 6 EVALUATION CRITERIA

The written price quotations for the requirement is estimated up to an estimated value of R1 000 000 (all applicable taxes included); therefore the **80/20** system shall be applicable.

### Criterion 1- Qualification Requirement

Bidders will first be evaluated in terms of the mandatory requirements. Bidders who do not fulfil all the requirements or do not submit the required documents will be disqualified.

### Criterion 2-Functionality Evaluation

Functionality is worth 50 points. The minimum threshold is 35 points. Bidders who score less than 35 points on functionality will therefore be disqualified; those who score 35 points or more will be further evaluated on **Criteria 3**. Functionality is the core criteria to this award and will be given a higher weight and may thereof be used as the basis for award.

### Criterion 3-Price and Preference Evaluation

Price and specific goals weighted points; evaluation will be conducted on an 80/20 preferential procurement principle.

The Services SETA reserves the right to conduct due diligence to verify information provided.

**NB: For comparison and to ensure a meaningful evaluation. Bidders are required to submit a detailed information in substantiation of compliance with gatekeeper and evaluation criteria, average price/ quotation/ fixed rate will either be used during the price evaluation. Bidders may be invited to make a presentation as part of the evaluation process.**

**FUNCTIONALITY SCORE SHEET**

**NAME OF POTENTIAL BIDDER**.....

**RFQ REFERENCE NUMBER**.....

1	B	C	D	E	F	G	H
FUNCTIONALITY	REQUIREMENT	SCORE QUALIFICATION	MEASUREMENT (what must be provided/ demonstrated as minimum)				
			Indicate what pages/ section in proposal?	Weighted Points	Yes	No	Score
<b>Capability of Service Provider</b>	The potential bidder must provide and attach three formal testimonial/ references letters with logo, letterhead, contactable details and relevant work/services executed signed by company representative/ Senior Official.	Attach (3) three or more written testimonials letters not older than five (5) years, with relevant experience in programme facilitation and/or project management: <ul style="list-style-type: none"> <li>- Three (3) testimonial = <b>10 pts</b></li> <li>- Two (2) testimonial = <b>7.5 pts</b></li> <li>- One (1) testimonial = <b>5 pts</b></li> <li>- No written testimonial=<b>0 pts</b></li> </ul>	Attach three (3) references letters  What page (s) or section of your proposal for 3 references letters may be found?  State <b>page (s) number</b> .....or State <b>section/ tab</b> .....on your proposal.	<b>10 pts</b>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Methodology and Project Approach</b>	Demonstrate an understanding of the project management within the public sector, SETA landscape, or skills development environment.	The bidder must demonstrate understanding linked to previous experience on: <ul style="list-style-type: none"> <li>• Public Finance Management Act = <b>2 pts</b></li> <li>• Skills Development Act = <b>2 pts</b></li> <li>• Grant Regulations = <b>2 pts</b></li> <li>• Risk Management = <b>2 pts</b></li> <li>• Performance Improvement = <b>4 pts</b></li> <li>• Process automation = <b>4 pts</b></li> <li>• Group Management and Conflict Resolution = <b>5 pts</b></li> <li>• Project Management <b>Principles = 4 pts</b></li> </ul>	<ul style="list-style-type: none"> <li>• Bid Proposal</li> </ul> What page (s) or section of your project implementation approach may be found?  State <b>page (s) number</b> .....or State <b>section/ tab</b> .....on your proposal.	<b>25 pts</b>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Assignment Experience</b>	The potential bidder must demonstrate the experience and the	The bidder must provide <b>full CV</b> of the facilitator: <b>1. Experience</b> in the field of <b>programme facilitation and project management – 10 pts</b>	<ul style="list-style-type: none"> <li>- Bid Proposal</li> </ul>	<b>15 pts</b>	<input type="checkbox"/>	<input type="checkbox"/>	

<p>expertise in the field of programme facilitation and project management</p>	<ul style="list-style-type: none"> <li>• Over 20 years of combined experience = <b>10 pts</b></li> <li>• Over 10 less than 20 years of combined experience = <b>8 pts</b></li> <li>• Over 5 and less than 10 years of combined experience = <b>6 pts</b></li> <li>• Over 3 and less than 5 years of combined experience = <b>4 pts</b></li> <li>• Less than 3 years = <b>0 pts</b></li> </ul> <p><b>2. Qualifications – 5 pts</b></p> <ul style="list-style-type: none"> <li>• PhD = <b>5 pts</b></li> <li>• Masters = <b>4 pts</b></li> <li>• Honors/PGDip = <b>3 pts</b></li> <li>• Degree = <b>2 pts</b></li> </ul>	<p>What page (s) or section of your proposal, key team members experience may be found?</p> <p>State <b>page (s) number</b>.....or State <b>section/ tab</b>.....on your proposal.</p>				
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Note that Evaluation Committee will use their own discretion to assess quality of all bid proposals received in relation to above functionality criteria and may further verify information submitted from relevant sources/ your client and use their own discretion to score your proposal accordingly.

<b>Total weighted Points</b>	<b>50</b>			
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<p>The minimum functionality threshold is <b>35</b> points. <u>Bidders who score less than 35 points on functionality will therefore be disqualified</u>; those who score 35 points or more will be further evaluated on <b>Criteria 3</b>.</p>		
<p>Price and Preference points used: <b>80/20</b> preferential procurement principle</p>	<p><b>80</b> (Price)</p>	<p>R.....,.....</p>
	<p><b>20</b> (Specific Goals)</p>	<p>..... points claimed</p>

<p><b>Name of Evaluator:</b></p>			
<p><b>Signature:</b></p>		<p><b>Date:</b></p>	<p>...../...../20.....</p>

**7. PRICING SCHEDULE**

**SBD 3.3**

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

In order to compare process, bidders must indicate their prices based on the following:

<b>Entity name</b>	
<b>Total value</b>	

<b>Deliverables</b>	<b>Total (Vat inclusive and all other charges)</b>
Workshop facilitation	
Workshop transcripts and report with recommendations within 7 days post-workshop	
Other related cost (If any provide breakdown)	
•	
<b>15% VAT</b>	
<b>Total Price</b>	

1. The accompanying information must be used for the formulation of quote.
2. Providers are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project R.....
3. Persons who will be involved in the project and rates applicable (certified invoices must be rendered in terms of the above schedule)
4. Travel expenses (specify, for example rate/km and total km (**SARS rates applicable only**), class of air travel, etc). Only actual costs are recoverable. Proof of the expenses incurred must accompany certified invoices.
5. Period required for commencement with project after acceptance of quote.....
6. Estimated man-days/ **delivery date** for completion of project.....

**7. BIDDER'S/ PROVIDER'S DISCLOSURE**

**SBD 4**

**1. Purpose of the form**

Any person (natural or juristic) may make an offer or offers in terms of this invitation to quote. 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 provider 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 quote process.

**2. Bidder's/ Provider's declaration**

2.1 Is the provider, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest<sup>1</sup> in the enterprise, employed by the state? **YES/NO**

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

Full Name	Identity Number	Name of State institution

2.2 Do you, or any person connected with the provider, 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 provider 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 quote, 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 quote will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The provider has arrived at the accompanying quote independently from, and without consultation, communication, agreement or arrangement with any competitor. However,

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

communication between partners in a joint venture or consortium<sup>2</sup> will not be construed as collusive bidding.

- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the quote, bidding with the intention not to win the quote and conditions or delivery particulars of the products or services to which this quote invitation relates.
- 3.4 The terms of the accompanying quote have not been, and will not be, disclosed by the provider, directly or indirectly, to any competitor, prior to the date and time of the official quote opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the provider 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 quote submitted where so required by the institution; and the provider was not involved in the drafting of the specifications or terms of reference for this quote.
- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to Quotes and contracts, quotes 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 QUOTE 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

**8. PREFERENCE POINTS CLAIM FORM**

**SBD 6.1**

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

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

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 quote process:

- the 80/20 system for requirements with a Rand value of up to R1 000 000 (all applicable taxes included); and

### 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 quote process is the 80/20 preference point system.
- b) The 80/20 preference point system will be applicable in this quote process. The lowest/highest acceptable tender will be used to determine the accurate system once quotes are received.

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

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

### 1.4 To be completed by the Services SETA:

The maximum points for this tender 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>

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

1.6 The Services SETA reserves the right to require of a tenderer, 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 Services SETA.

## 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 quotation 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:

$$\begin{array}{ccc}
 \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\
 \\
 P_s = 80 \left( 1 - \frac{P_t - P_{min}}{P_{min}} \right) & \mathbf{or} & P_s = 90 \left( 1 - \frac{P_t - P_{min}}{P_{min}} \right)
 \end{array}$$

Where

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

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

#### 3.2.1. POINTS AWARDED FOR PRICE

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

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

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 quote process:

4.2. In cases where Services SETA 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 Services SETA 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 quote process, 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 Services SETA 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 quote process and points claimed are indicated per the table below.**

***(Note to Services SETA: 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 (Entities)	Number of points allocated (80/20 system)	Number of points claimed (80/20 system) (To be completed by the tenderer)	Attach relevant supporting document(s) is compulsory to claim points allocated (Yes/No)
More than 51% Black Owned	2		
Female Owned	7		
Youth Owned	8		
Disabled Owned	1		
Skills Transfer and Development	2		

### 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 Services SETA 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.

..... <b>SIGNATURE(S) OF TENDERER(S)</b>	
<b>SURNAME AND NAME:</b>	.....
<b>DATE:</b>	.....
<b>ADDRESS:</b>	.....
	.....
	.....
	.....

**9. CONTRACT FORM – PURCHASE OF GOODS/WORKS**

**SBD 7.1**

**PART 1 (TO BE FILLED IN BY THE BIDDER)**

1. I hereby undertake to supply all or any of the goods and/or works described in the attached bidding documents to (name of institution) ..... in accordance with the requirements and specifications stipulated in RFQ 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 quote.

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 quote;
  - Proof of tax compliance status;
  - Pricing schedule(s);
  - Technical Specification(s);
  - Preference claim form for Preferential Procurement in terms of the Preferential Procurement Regulations;
  - Bidder's Disclosure form;
  - 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 quote; 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 fulfillment 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 quote.

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

NAME (PRINT) .....

CAPACITY .....

SIGNATURE .....

NAME OF FIRM .....

DATE .....

WITNESSES	
1	.....
2.	.....
DATE: .....	

**CONTRACT FORM - PURCHASE OF GOODS/WORKS**

**PART 2 (TO BE FILLED IN BY THE PURCHASER)**

1. I..... in my capacity as..... accept your quote under reference number .....dated.....for the supply of goods/works indicated hereunder and/or further specified in the annexure(s).

2. An official order indicating delivery instructions is forthcoming.
3. I undertake to make payment for the goods/works delivered in accordance with the terms and conditions of the contract, within 30 (thirty) days after receipt of an invoice accompanied by the delivery note.

PURPOSE OF THIS PROJECT: APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT THE FIRE ASSESSMENT AT NELSPRUIT PROVINCIAL OFFICE	PRICE (ALL APPLICABLE TAXES INCLUDED)	BRAND	DELIVERY PERIOD	TOTAL PREFERENCE POINTS CLAIMED	POINTS CLAIMED FOR EACH SPECIFIC GOAL

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

SIGNED AT .....ON.....

NAME (PRINT) .....

SIGNATURE .....

OFFICIAL STAMP

WITNESSES

1. ....

2. ....

DATE .....

**11. CONTRACT FORM – RENDERING OF SERVICES**

**SBD 7.2**

**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)**

7. I hereby undertake to render services described in the attached bidding documents to (name of the institution) ..... in accordance with the requirements and task directives / proposals 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 date of the bid .
8. The following documents shall be deemed to form and be read and construed as part of this agreement:
  - (iv) Bidding documents, viz
    - Invitation to bid;
    - Proof of tax compliance status;
    - Pricing schedule(s);
    - Filled in task directive/proposal;
    - Preference claim form for Preferential Procurement in terms of the Preferential Procurement Regulations;
    - Bidder’s Disclosure form;
    - Special Conditions of Contract;
  - (v) General Conditions of Contract; and
  - (vi) Other (specify)
9. 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 services 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.
10. 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.
11. I declare that I have no participation in any collusive practices with any bidder or any other person regarding this or any other bid.
12. I confirm that I am duly authorised to sign this contract.

NAME (PRINT) .....

CAPACITY .....

SIGNATURE .....

NAME OF FIRM .....

DATE .....

WITNESSES	
1	.....
2	.....
DATE: .....	

**CONTRACT FORM - RENDERING OF SERVICES**

**PART 2 (TO BE FILLED IN BY THE PURCHASE)**

4. I..... in my capacity as..... accept your bid under reference number .....dated.....for the rendering of services indicated hereunder and/or further specified in the annexure(s).

- 5. An official order indicating service delivery instructions is forthcoming.
- 6. 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.

DISCRIPTION OF THIS PROJECT:	PRICE (ALL APPLICABLE TAXES INCLUDED)	COMPLETION DATE	TOTAL PREFERENCE POINTS CLAIMED	POINTS CLAIMED FOR EACH SPECIFIC GOAL

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

SIGNED AT .....ON.....

NAME (PRINT) .....

SIGNATURE .....

OFFICIAL STAMP

WITNESSES

1 .....

2 .....

DATE: .....

