

SERVICES SETA RFQ DOCUMENT FOR THE SUPPLY, IMPLEMENTATION, MAINTENANCE AND SUPPORT OF A BOARD AND COMMITTEE MANAGEMENT SYSTEM (BCMS) FOR SERVICES SETA

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A handwritten signature in black ink, appearing to be 'P. R. R.', is positioned above the date.

30-06-2026

1. RFQ CHECKLIST

The bidder must submit one proposal(s) electronically https://sseta.operations.sa.dynamics.com		
• The Services SETA RFQ documents must be submitted in official format (not to be re-typed);		
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 (SBD's 1, 3.1,4, 6.1, 7.1 & 7.2).	
Schedule 3	Provide and attach a copy of Company Registration Certificate.	
Schedule 4	The potential bidder must provide proof of being: • An accredited OEM partner of the proposed BCMS Solution if not a Bespoke (Bidder must possess the ownership rights or be an accreditation reseller/provider of the Board and Committee Management System that is being proposed. • A certified Microsoft Solutions Partner	
Schedule 5	ID. Documents, Cancelled Cheque or 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-000733	CLOSING DATE:	1707/2026	CLOSING TIME:	1H00 PM
DESCRIPTION	APPOINTMENT OF A SERVICE PROVIDER FOR THE SUPPLY, IMPLEMENTATION, MAINTENANCE AND SUPPORT OF A BOARD AND COMMITTEE MANAGEMENT SYSTEM (BCMS) FOR SERVICES SETA				
ENQUIRIES DUE DATE	All enquiries regarding this RFQ should be in writing and may be directed at E-mail RFQs@serviceseta.org.za by 10:00AM on the 16/07/2026				
Important to note: - Bidders should ensure that RFQs are submitted electronically to the correct Link https://sseta.operations.sa.dynamics.com as late submissions will not be accepted for consideration. - All RFQs must be submitted on the official forms – (not to be re-typed).					
NOTE! THE RELEVANT BIDDER MUST SIGN IN FULL RFQ DOCUMENT WHERE IT IS REQUIRED					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Conny Mathebula		CONTACT PERSON	Sibusiso Mabaso	
TELEPHONE NUMBER	(011) 276 9621		TELEPHONE NUMBER	(011) 276 9791	
FACSIMILE NUMBER	N/A		FACSIMILE NUMBER	N/A	
E-MAIL ADDRESS	RFQs@serviceseta.org.za		E-MAIL ADDRESS	sibusisoma@serviceseta.org.za	
SUPPLIER INFORMATION					
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.....
BANK NAME			BANK ACCOUNT NUMBER		
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	☐ Yes ☐ No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?	☐ Yes ☐ No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]	
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 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

PURPOSE OF THIS PROJECT
APPOINTMENT OF A SERVICE PROVIDER FOR THE SUPPLY, IMPLEMENTATION, MAINTENANCE, AND SUPPORT OF A BOARD AND COMMITTEE MANAGEMENT SYSTEM (BCMS) FOR SERVICES SETA

INTRODUCTION AND OVERALL OBJECTIVES

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

The Services Sector Education and Training Authority (SSETA) hereby invites bids from experienced, knowledgeable service providers to submit proposals for the supply, implementation, maintenance and support of a secure, efficient, and integrated Board Pack Management System that supports all Accounting Authority and committees' operations from document preparation to post-meeting record-keeping.

The solution must:

- Improve efficiency in compiling and distributing board and committee packs.
- Strengthen information governance and data protection compliance.
- Enable role-based access and digital tracking.
- Enhance collaboration and version control across departments.
- Provide reliable audit logs and reporting for internal and external review.
- Integrate with existing organizational tools (e.g. Microsoft 365, SharePoint, Teams).

LATE SUBMISSIONS WILL NOT BE ACCEPTED AFTER THE CLOSING DATE AND TIME

Please note that all pertinent documentation is available on the Services SETA website at www.serviceseta.org.za

1. BACKGROUND

Currently, the Services SETA Secretariat uses manual processes and free online tools to compile and distribute board packs. This approach presents several challenges:

- **Data Security Risk:** Sensitive organizational documents reside on third-party, unverified platforms with unknown access controls.

- **Manual Effort:** Board packs are compiled, merged, and numbered manually, consuming significant time and increasing the chance of human error.
- **Lack of Traceability:** There are no audit trails to track document access changes.
- **Limited Access Control:** Current methods cannot restrict or assign document access to specific Accounting Authority members, committees, or roles.

The new system is required to mitigate these risks, automate manual processes, ensure secure document handling and provide full governance and audit capabilities. It will enable a fully digital, secure, and automated process that:

- Allows departmental submissions via a centralized portal with defined deadlines.
- Repository of governing documents (e.g. TOR and Minutes of the meetings)
- Automates agenda creation and links agenda items to supporting documents.
- Send notifications and reminders to contributors and committee members.
- Provides controlled access by role, committee, or user group.
- Maintains complete version history and audit logs.
- Integrates with Microsoft Teams for scheduling and SharePoint and Datastor for secure document storage.

Reduces manual intervention while maintaining compliance with governance processes.

2. SCOPE OF WORK/ DELIVERABLES

2.1 System Design and Implementation

- It is a mandatory requirement that this system shall be deployed and hosted in Services SETA owned environment either on premise or in the Services SETA Cloud.
- Supply, Deploy and Customize a secure, centralized platform for board and committee document management.
- The solution must comprehensively support **ALL governance structures and committees** within Services SETA, including but not limited to:
 - Accounting Authority (Board)
 - Executive Committees (EXCO)
 - Sub-committees (e.g. Audit and Risk, Finance, ICT, REMCO, Governance, Chambers)
 - Ad hoc and special governance structures
 - Any future committees established during the contract period
- The system must allow:
 - Configuration and onboarding of new governance structures without system redesign
 - Segregated, secure workspaces for each committee and governance structure
 - Alignment to each committee's Terms of Reference (TOR)

- Configure role-based access for Accounting Authority, Committees, Secretariat, and departmental users.
- Provide a system architecture that supports scalability and future enhancements.
- Confirm hosting model (on-premises or cloud) in consultation with Services SETA ICT division.
- Ensure high availability with 99% uptime, redundancy, and disaster recovery capabilities.
- Implement automatic backups and secure data storage aligned with organizational policies.

2.2 User Roles and Access Control

- Configure **role-based access (RBAC)** for the following:
 - ICT Administrator (full system configuration and security control).
 - Secretariat (meeting creation, pack compilation, publishing).
 - Departmental Users (document submission).
 - Board Members and Chairperson (view, comment, endorse).
- Ensure **granular permissions** aligned to the Document Loss Prevention policies in Trend Micro, Microsoft Purview and Records Management and Data Classification Policy for uploading, viewing, editing, approving, sharing and annotating documents.

2.3 Security Framework

- Implement multi-factor authentication (MFA) for all users.
- Apply encryption at rest and in transit for all data.
- Maintain detailed audit trails for user actions (uploads, edits, downloads).
- Ensure full compliance with POPIA and Services SETA ICT security standards.
- All data must be stored on secure, authorised platforms (on-premises or approved cloud).
- Ensure role-based access and document-level permissions.
- Align governance with the Services SETA's constitution and committee's terms of reference

2.4 Integration and Interoperability

- Seamless integration with:
 - **Microsoft Teams** for meeting scheduling and notifications.
 - **SharePoint and Intranet**
 - **Datastor** for document storage and archiving
 - **Performance management system** for both organizational and individual performance.
 - **Governance [p] Risk Compliance Management System** for access to governance committee meetings and resolutions.
- Support **Single Sign-On (SSO)** using Azure or On Premise Active Directory.
- Provide APIs or connectors for future integrations with organizational systems.

2.5 Workflow Automation (see diagram in 3.9.2 below)

- Enable centralized submission portal for departmental reports.
- Automate agenda creation linked to submissions and scheduled meetings.
- Support automatic compilation, pagination, and numbering of board packs.
- Provide notifications and reminders for submission deadlines and meeting schedules.

2.6 User Interface and Experience

- Deliver an intuitive, user-friendly interface aligned with Services SETA corporate branding.
- Minimize training requirements through simple navigation and clear workflows.
- Ensure compatibility across devices (desktop, tablet, mobile).

2.7 Performance and Scalability

- System must handle **large document volumes** (e.g., packs exceeding 1,000 pages) without performance degradation.

Support **concurrent user access** for multiple committees and departments.

In Summary the solution must meet the following requirements:

- Governance and committee management functionality.
- Automated board pack compilation, agenda creation, pagination and document version control.
- Electronic meeting management, including annotations, comments, voting, resolutions and minute management.
- Action and resolution tracking with dashboards and reporting.
- Workflow automation for submissions, approvals, notifications and reminders.
- Role-based access control and document-level permissions.
- Comprehensive audit trails and compliance reporting.
- Integration with Microsoft 365, Teams, SharePoint, Active Directory and other relevant organisational systems.
- Mobile and offline capability.
- Security requirements, including MFA, encryption, POPIA compliance and disaster recovery.
- User licensing requirements, including the expected number of users and scalability.
- System availability and service level requirements.
- Administrator functionality, reporting and analytics.
- Implementation approach, training, knowledge transfer and ongoing support.
- AI-enabled functionality where available, such as meeting summaries, intelligent search and action extraction.

3. THE DURATION OF ASSIGNMENT

It is envisaged that the project will be for a period of (1) year from the date of appointment.

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 ☐	No ☐
2. Bid document must be signed and duly completed, together with all declaration of interest/ standard bidding documents (SBD's 1, 3.3, 4, 6.1, 7.1 & 7.2).	Yes ☐	No ☐
3. Provide and attach a copy of Company Registration Certificate	Yes ☐	No ☐
4. The potential bidder must provide and attach a proof of being: - An accredited OEM partner of the proposed BCMS Solution if not a Bespoke (Bidder must possess the ownership rights or be an accreditation reseller/provider of the Board and Committee Management System that is being proposed. - A certified Microsoft Solutions Partner	Yes ☐	No ☐

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 ☐	No ☐
2. Female Owned Entity	7	Yes ☐	No ☐
3. Youth Owned Entity	8	Yes ☐	No ☐
4. Disabled Owned Entity	1	Yes ☐	No ☐
5. Skills Transfer and Development	2	Yes ☐	No ☐
6. (Attach a proof of client reference letter/ project(s) indicating skills transfer conducted).			

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)

1. The tenderer must submit proof of its B-BBEE status level of contributor PLEASE NOTE: The tenderer failing to submit proof of B-BBEE status level of contributor or is a non-compliant contributor to B-BBEE may not be disqualified but may only score points out of 80 for price; and scores Zero(0) points out of 20 for specific goals. Service providers are encouraged to comply with B-BBEE requirements for a more competitive advantage under B-BBEE scoring.	Yes ☐	No ☐
2. The potential bidder must be Tax Compliant on the National Treasury Central Supplier Database (CSD) prior to award.	Yes ☐	No ☐

3. The Supplier status must be active when verifying with the Central Supplier Database (CSD). Provide MAAA number	Yes ☐	No ☐
4. Tax Status, the potential bidder must indicate pin number.....	Yes ☐	No ☐

Specific Goals Definitions

Black Owned entities	Black Owned entities (Company must be in the hands of 51% or more black people)
Women	Promote Women owned and empowered enterprises.
Youth	Youth Owned Entities: addressing the needs of Youth people.
Disability	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.
Skills Transfer	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-Price and Preference Evaluation

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

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

7. PRICING SCHEDULE**SBD 3.3**

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

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

Entity name	
Total value	

Deliverables	Quantity	Unit Cost	Total (Vat inclusive and all other charges)
Project Management	1		
Project Governance Documentation	1		
Planning & Analysis	1		
Deployment and Onboarding	1		
Customization and Integration	1		
Testing and Quality Assurance	1		
Training			
Licensing Requirements Cost (If Applicable) (1-year package model)	12		
Change Management	1		
Post Implementation: Service Management, Support and Maintenance cost (year 1)	12		
Other related cost (If any provide breakdown)	12		
15% VAT			
Total (including all other applicable charges)			

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. Other expenses, for example accommodation (specify, e.g. Three-star hotel, bed and breakfast, telephone cost, reproduction cost, etc.). On basis of these particulars, certified invoices will be checked for correctness. Proof of the expenses must accompany invoices.
6. Period required for commencement with project after acceptance of quote.....
7. Estimated man-days/ **delivery date** for completion of project.....

8. 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 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 provider, 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 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, 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 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.

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.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

9. PREFERENCE POINTS CLAIM FORM

SBD 6.1

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 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
PRICE	80

SPECIFIC GOALS	20
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 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:

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

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:

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

Where

- P_s = Points scored for price of tender under consideration
 P_t = Price of tender under consideration
 P_{max} = 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.

.....
SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME:

DATE:

ADDRESS:

.....

.....

10. CONTRACT FORM – PURCHASE OF GOODS/WORKS**SBD 7.1**

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 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);
 - 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;
 - (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 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 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 FOR THE SUPPLY, IMPLEMENTATION, MAINTENANCE AND SUPPORT OF A BOARD AND COMMITTEE MANAGEMENT SYSTEM (BCMS) FOR SERVICES SETA	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

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 fulfillment 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 numberdated.....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 ATON.....

NAME (PRINT)

SIGNATURE

OFFICIAL STAMP

WITNESSES

1

2

DATE:

