

SECTION A: BID ADVERT

SBD1

PART A INVITATION TO BID

Bid Description	BID DOCUMENT FOR PROCUREMENT OF A SERVICE PROVIDER TO CONDUCT IMPACT EVALUATION OF THE NATIONAL YOUTH SERVICE PROGRAMME										
Bid number	IDTDPWI-NYS0824										
Name of institution	Independent Development Trust (IDT)										
The place where goods, works or services are required	IDT National Offices										
Closing date and time	Date	2	4	0	9	2	0	2	4	Time	12h00 pm
Contact details	Physical address	IDT National Office Glenwood Office Park, Cnr Oberon and Sprite Streets, Faerie Glen 0043.									
	Tel	012 845 2000									
	email	SFTenders@idt.org.za									
	Contact person	David Motsatse									
Where bids can be collected	IDT website www.idt.org.za/business-opportunities/current-tenders/ and the National Treasury e-Tender Portal available on www.treasury.gov.za										
Where bids must be delivered	IDT National Office Glenwood Office Park, Cnr Oberon and Sprite Streets, Faerie Glen 0043.										
Category (Goods/Services)	Services										
Sector	EPWP										
Supplier Details											
Name of bidder											
Postal Address											
Street Address											
Telephone Number	Code			Number							

Board of Trustees: Adv. Kwazi Mshengu (Chairperson), Ms. Karabo Siyila, (Deputy Chairperson), Ms. Lindelwa Dlamini, Ms. Prudence Mkhwanazi, Mr. Krishen Sukdev, Adv. Lufuno Nevondwe, Ms. Rehana Parker, Mr. Mpilo Mbambisa

Chief Executive Officer: Ms. Tebogo Malaka.

Trust Registration No: IT 669/91

Cell phone Number						
Email Address						
Supplier Compliance Status	Tax Compliance System PIN		and	Central Supplier Database No:	MAAA	

PART B TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:
<p>1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.</p> <p>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.</p> <p>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.</p> <p>1.4. THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).</p>
2. TAX COMPLIANCE REQUIREMENTS
<p>2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.</p> <p>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.</p> <p>2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.</p> <p>2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.</p> <p>2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.</p> <p>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.</p> <p>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."</p>

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:

SECTION B: ADDITIONAL TERMS AND CONDITIONS FOR BIDDING

1. TERMS AND CONDITIONS

ITEM	DESCRIPTION
1.1 Tender Issue Date	23 August 2024
1.2 Compulsory Briefing	No Briefing Session will be held for this bid.
1.3 Bid Reference No.	IDTDPWI-NYS0824
1.4 Enquiries	Any queries shall be directed in writing to the IDT through the email. Email: SFTenders@idt.org.za
1.5 Mandatory Requirements	1.5.1 Authority to Sign the Bid Document and all Annexures (see bid document). 1.5.2 Valid COIDA Certificate 1.5.3 Company Registration Documents FAILURE TO SUBMIT ANY OF THE ABOVE WILL LEAD TO DISQUALIFICATION
1.6 Mandatory Administrative Requirement	1.6.1 Submission of fully completed and signed Invitation to Bid (SBD 1) 1.6.2 Submission of fully completed and signed Bidder's Disclosure (SBD 4) 1.6.2 Submission of fully completed and signed Bidder's Price (SBD 6.1)
1.7. Returnable documents	The following returnable documents shall be submitted together with the bid. The validity of this documentation will be verified at the time of award. 1.7.1. Full Report of Central Supplier Database 1.7.2. Valid Tax Compliance Letter with a unique pin 1.7.3. Proof of residence (proof of ownership or lease contract or municipal services bill)
1.8. Evaluation Criteria	This bid will be evaluated in stages three 1.8.1. Mandatory Requirements 1.8.2. Functionality Criteria 1.8.3. 80/20 Preferential Point System Only Bidders who have passed functionality will be evaluated further. A minimum threshold for functionality is 80 points.
1.9. Submission of Bid documents	1.9.1 Bids must be delivered on or before the closing date and the time as per the advert. 1.9.2 Bidders must sign the Bid Submission Register upon delivery of the bid at the regional office. Bidders not on the Bid Submission Register will not be considered. This applies to bids, which are submitted through Courier companies. Bidders MUST inform their Courier Companies to sign the Bid Submission Register in the name of the bidder. 1.9.3 Bids submitted after the closing time will not be considered. 1.9.4 Bid documents shall be hand-delivered in 1 combined pack (i.e. Bid document and its accompanying Annexures) to the Implementing Agent (IDT), and shall be marked as follows:

ITEM	DESCRIPTION
	Marked confidential Bid and Indicate the following:
	BID NUMBER: IDTDPWI-NYS0824
	BID DESCRIPTION: BID DOCUMENT FOR PROCUREMENT OF A SERVICE PROVIDER TO CONDUCT IMPACT EVALUATION OF THE NATIONAL YOUTH SERVICE PROGRAMME
	THE BID BOX WILL BE LOCATED AT THE IDT NATIONAL OFFICE MAIN RECEPTION AREA AS PER THE ADDRESS INDICATED ON THE BID DOCUMENT.
	NB: Emailed or Faxed bid documents will be disqualified.
1.10. Notes to bidders	1.10.1. The bid shall be valid for 90 calendar days.
	1.10.2. Bidders' queries will be attended to only up to 5 calendar days before the closing date.
	1.10.3. Should bidders not receive any correspondence after 90 days of tender validity period then bidders should consider their application unsuccessful.
	1.10.4. Bids must be submitted on the official forms, which are provided as part of the bid document.
1.11. Company Resources	1.11.1. The bidder is to provide details of a minimum of four (4) human resources to be used in the project and attach proof of their relevant qualifications (qualification and details of personnel).
	1.11.2. Such human resource shall always be available for the project during the contract period. Should assigned human resource be changed for some other reason, he/she should be replaced by a person/s of equivalent or higher qualification.
1.12. Cancellation Costs	1.12.1. Should the programme be cancelled by the client Department, due to financial constraints and/or other reasons, the IDT and the Client Department shall not be liable to remunerate the service provider for any potential loss of business and/or profit.
1.13. Base office	1.13.1. The base office must be in Gauteng province.
1.14. IDT's Reservation of Rights	1.14.1. IDT reserves the right to conduct a risk assessment if the recommended bidder is the responsive bidder and has already been awarded a contract.
	1.14.2. IDT reserves the right to negotiate with the bidder for the price.
	1.14.3. IDT reserves the right to cancel or withdraw this request for bid without prior notice and without furnishing any reasons whatsoever.
	1.14.4. IDT reserves the right to subject Bidders and their facilities to assessment as part of the evaluation process or as a condition to be appointed.
	1.14.5. The IDT reserves the right to amend, modify, withdraw this Bid, or terminate any of the procedures or requirements set out herein at any time and from time to time, without prior notice and without liability to compensate or reimburse any person.

ITEM	DESCRIPTION
1.15. Bid Document and Contract	1.15.1. Bidders are advised to ensure that they familiarize themselves with all the contents of the Bid documents, as those will form the basis of the contract to be entered into. Any contents of this document that the bidder requires clarity on shall be brought forward before the Bid submission date stipulated in this Bid document.
	1.15.2. Note: The Bid Document must be completed using permanent black ink.
	1.15.3. The Bid document must be bound and be in a sealed envelope.
	1.15.4. All Bid documents submitted to the IDT will become the property of the IDT and will as such not be returned to the bidders. Proprietary information should be identified as such in each proposal.
	1.15.5. If the IDT amends this bid document, the IDT will issue an erratum.
	1.15.6 This document must be used solely for the purpose it is intended to achieve.
	1.15.7 The Company will be expected to enter into a contract with the IDT.
	1.15.8 Bidders who are blacklisted with the National Treasury will be eliminated, therefore, not considered any further evaluation.
1.16. Duration Of Contract	1.16.1. The project is estimated to take six (6) months to complete.
1.17. Data Collection Method	1.17.1 Interviews must be conducted (face-to-face)
1.18. Conflict of Interest	1.18.1 The service provider cannot have participated in the National Youth Service (NYS) programme preparation, formulation, and/or implementation (including the writing of the programme documents) and should not have a conflict of interest with the programme's related activities

SECTION C: EVALUATION METHOD

2. BID EVALUATION METHODOLOGY

The Three-stage evaluation method will be used for the appointment of the Service Provider for the Impact Assessment Study of the National Youth Service Programme.

2.1 Compulsory Requirements

The compulsory requirements are gatekeeper criteria and must be satisfied by the bidders before functionality evaluations. Failure to satisfy any of these requirements will lead to disqualification.

2.2 Functionality Criteria

All bidders who satisfy the Compulsory Requirements are further evaluated for functionality. This part of the evaluation looks at the following:

FUNCTIONALITY CRITERIA:
1. COMPANY EXPERIENCE
2. TECHNICAL QUALITY OF THE PROPOSAL (BID)
3. TEAM LEADER EXPERIENCE
4. TEAM LEADER QUALIFICATION
5. TEAM MEMBER(S) EXPERIENCE
6. TEAM MEMBERS QUALIFICATIONS

Only the Bidders that obtain a threshold of 80 points will be considered further. The Bidders, which fail to meet a threshold of 80 points, will be eliminated at this stage.

2.3 Price

The specific goals for this bid will be on 80/20 preference points.

SECTION D: ABOUT THE BIDDER

3. BACKGROUND OF THE BIDDER

3.1 BIDDER'S DETAILS

Please complete the required information below:

Name of the Organisation	
Registration number	
Contact telephone number	
Contact mobile number	
Email address	
Web address (if available)	
Physical Address	
Key Contact person	
Alternative contact person (Name and contact number)	

DECLARATION:

I..... (Name and Surname), Identity number.....in my capacity as..... confirm that I have provided information which is to the best of my knowledge complete, true and correct.

Signed at..... (Place) on theday of.....(month) of 2024.

SECTION E: TERMS OF REFERENCE

INTRODUCTION

The Expanded Public Works Programme (EPWP) is a government initiative by which employment opportunities are created and supported in instances where the private sector does not meaningfully reduce unemployment in the country. At its core, the EPWP targets the poor unemployed and unskilled South Africans and most work opportunities are created through the implementation of programmes and projects in a labour-intensive manner. Strategically, the EPWP is positioned to respond to the following socio-economic challenges, e.g. unemployment (through the creation of work opportunities) and inequality (through income transfer) ultimately putting a dent in poverty. These elements allow for improved community and social cohesion while addressing social ills and in turn safeguarding South Africa's democracy.

The EPWP programme operates within four sectors, namely; the Non-State Sector, coordinated by the Department of Public Works and Infrastructure (DPWI) together with the Independent Development Trust (IDT) as an implementing agent; the Infrastructure Sector, also coordinated by the DPWI; the Social Sector, coordinated by Department of Social Development (DSD); and the Environment and Culture Sector, coordinated by Department of Forestry, Fisheries and the Environment (DFFE). The EPWP is implemented by the national and provincial departments of public works. The programme demographic participation target for women is currently set at 60%, whilst that of persons with disabilities (PWDs) is at 2%. The youth participation target is 55%.

The “*National Youth Service (NYS) Programme*” was launched in 2003 and was then adopted and encapsulated into the Infrastructure sector (led by the DPWI) in April 2007. With that said, the “DPWI NYS” is a service delivery and nation-building initiative for South Africa's youth. The EPWP's NYS aims to strengthen service delivery, build nation-building capacity, strengthen social cohesion and help young people acquire the skills they need to achieve sustainable livelihoods.

The current study will focus (specifically) on the impact of the NYS as implemented by DPWI. The intention is to determine the programme's performance against set objectives and targets, strategies and its implementation modalities, the efficiency and effectiveness of institutional arrangements (management and coordination structures), constraints, opportunities, and corrective actions needed for the NYS to achieve optimal impact. Furthermore, the impact evaluation study is intended to assess DPWI's NYS' performance at both micro-economic and macro-economic levels. Ideally, the study findings, should be able to help enhance learning; and

provide guidance to inform evidence-based decision-making and effective and efficient management of the programme.

PURPOSE OF THE TERMS OF REFERENCE

The current Terms of Reference (ToRs) seek to provide guidance on how to hire an experienced, suitable and qualified service provider to carry out the proposed NYS impact assessment using the most suitable research methods.

AIM AND OBJECTIVES OF IMPACT EVALUATION

The aim of this project study is to determine the impact of the NYS Programme. To achieve this aim the study must adequately achieve the following particular objectives:

- Determine the relevance of the NYS;
- Determine the effectiveness of the implementation of the NYS programme;
- Determine the cost-efficiency of the outcomes achieved by the NYS programme;
- Determine the impact of the NYS programme;
- Determine the sustainability of the programme's impact; and
- Determine, if there are any unintended impacts that have occurred due to the NYS programme.
- The findings of the study should guide approaches and strategies for the NYS programme across all spheres of government in order to inform policy reviews of the programme.

SUGGESTED GENERAL APPROACH TO IMPACT EVALUATION

The proposed impact evaluation research seeks to collect data to measure the impact on both programme outcomes and impacts. The study must make use of a representative sample from all relevant stakeholders, attribution of impact through interviewing both beneficiaries and non-beneficiaries and provide results for impact level. Relevant and most suitable research methods must be used by the service provider to assess the impact of the project. A statistically sound sampling and analysis methods must be implemented.

Note: *The service provider must ensure that the proposal aligns with their bid price for the assignment.*

Table 1: The total number of NYS learners trained between April 2019 - March 2024

Province	Number of learners
EC	218
FS	173
GP	192
KZN	340
LP	271
MP	439
NC	121
NW	151
WC	254
Total	2159

IMPACT EVALUATION KEY DELIVERABLES

The service provider must submit an inception report three weeks after appointment. Submit a complete final evaluation report (electronic and hard copies) incorporating comments and including an abstract, an executive summary (not exceeding four pages) within two (2) weeks of receiving comments from the evaluation steering committee on the draft report. A well-structured high level summary of the final impact evaluation report (between 30 and 40 pages) together with a Power Point presentation outlining critical aspects (such executive summary, research objectives and rationale, findings, conclusions, recommendations, etc.) of the impact evaluation will also be required.

PROJECT TIME FRAME

- The study will take a period of six (6) months and the project will commence immediately after appointment.
- Discussion and finalisation of the inception report will take place three (3) weeks after appointment.
- A draft impact evaluation report to be submitted four (4) months after the finalisation of the inception report. The draft impact evaluation report should cover the work undertaken with preliminary results, findings, conclusions and recommendations.
- A workshop will be held with the key stakeholders two (2) weeks after the draft impact evaluation report is submitted to review the draft report.
- A detailed final report must be submitted two (2) weeks after the draft impact evaluation report is presented and discussed.

Note: The Service Provider will be required to ensure that regular meetings with the project management team are held to report on progress.

CONTRACTING DETAILS

The service provider will be contracted by the IDT to undertake the assignment. This will be based on the proposal. The service provider shall be accountable to the IDT and the evaluation steering committee in terms of fulfilling the actions set out in the proposal.

SECTION F: TECHNICAL EVALUATION

4. EVALUATION CRITERIA FOR FUNCTIONALITY

4.1 Functionality Criteria

All **bidders** who satisfy the Compulsory Requirements are evaluated further for functionality. This part of the evaluation looks at the following:

FUNCTIONALITY CRITERIA:	WEIGHT
1. COMPANY EXPERIENCE	20
2. TECHNICAL QUALITY OF THE PROPOSAL (BID)	40
3. TEAM LEADER EXPERIENCE	05
4. TEAM LEADER QUALIFICATION	20
5. TEAM MEMBER(S) EXPERIENCE	05
6. TEAM MEMBERS QUALIFICATIONS	10
Total	100 Points

Only the Bidders which obtain a threshold of 80 points will be considered further. The Bidders which fail to meet a threshold of 80 points will be eliminated at this stage.

FUNCTIONALITY EVALUATION SCORECARD

Functionality criteria:	Points:
<p>1. COMPANY EXPERIENCE.</p> <p>Previous experience based on a number of projects of similar nature successfully completed over the last five (5) years.</p> <p>a) Bidders must attach the company's profile</p> <p>b) and reference letters from clients for the projects mentioned above. Letters must include the project names, dates of when the projects were executed, contacts of references, cost of the project undertaken, etc.</p>	20
<p>2. TECHNICAL QUALITY OF THE PROPOSAL (BID).</p> <p>The technical quality of the proposal will be assessed based on the following criteria:</p> <p>c) Thoroughness of research methods:</p> <p>d) Clear project implementation plan:</p>	40
<p>3. TEAM LEADER EXPERIENCE.</p> <p>Team leader must possess relevant working experience in evaluation and research of government interventions or related projects. (Bidders must attach detailed CV's of the team leader specifying relevant experience and dates).</p>	05
<p>4. TEAM LEADER QUALIFICATION.</p> <p>Team leader must possess a minimum of Masters' degree qualification in Social Science or other closely related field. (Bidders must attach certified copies of the educational qualification of the team leader).</p>	20
<p>5. TEAM MEMBER(S) EXPERIENCE.</p> <p>The core team should comprise at least three (3) members. Each team member must possess at least (3) years' work experience post qualification in conducting evaluation and research in government intervention or related projects. (Bidders must attach detailed CVs of the team member(s) specifying relevant experience and dates).</p>	05

<p>6. TEAM MEMBERS QUALIFICATIONS.</p> <p>Core team must possess a qualification in: Statistics, Built environment or a related qualification; and Economics Science/Social Science/Monitoring and Evaluation. (Bidders must attach copies of the educational qualifications of the team members).</p> <p>Collectively, the core team must possess the following qualifications:</p> <ul style="list-style-type: none"> a) Masters in Statistics. b) Masters in Built Environment/ Civil Engineering / Construction or any relevant qualification. c) Masters in Economic Sciences/Social Science/Monitoring and Evaluation. 	10
Total:	100 Points

6. COMPULSORY BRIEFING SESSIONS

There will be no Compulsory Briefing Sessions.

SECTION G: RETURNABLE DOCUMENTS / SUBMISSION

CHECKLIST

Returnable documents **MUST** be submitted together with the bid document. Failure to submit any of the Compulsory Requirements will result in the automatic elimination of the bidder.

RETURNABLE DOCUMENTS/SUBMISSION CHECKLIST	Mark with an (X)
Authority to Sign the Bid Document and all Annexures	
Valid COIDA Certificate	
Company Registration Documents	
Submission of fully completed and signed Invitation to Bid (SBD 1)	
Submission of fully completed and signed Bidder's Disclosure (SBD 4)	
Submission of fully completed Preference Points Claim form in terms of the Preferential Procurement Regulations 2022 (SBD 6.1)	
Full Report of Central Supplier Database	
Valid Tax Compliance Letter with a unique pin	
Proof of bidder residence (proof of ownership or lease contract or municipal services bill)	

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:

.....

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

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.

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.
- 3.5 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.6 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.7 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF

PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN

MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

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

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.

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

- a) The applicable preference point system for this tender is the **80/20** preference point system.
- b) **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	90	80
SPECIFIC GOALS	10	20
TARGETED GROUP		
Women	3	6
Youth	3	6
People with Disabilities	2	4

Black People	2	4
Total points for Price and SPECIFIC GOALS	100	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:

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

Where

P_s = Points scored for price of 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:

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

Where

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 (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Women	3	6		
Youth	3	6		
People with Disabilities	2	4		
Black People	2	4		

Source Documents to be submitted with the Bid or RFQ

*CIPC Document	(Company Registration Document will be required for verification (CIPC DOC))
*Woman	(Originally Certified ID Document)
*Youth	(Originally Certified ID Document)
*People with Disability	(Letter from the Dr. Confirming the Disability)
*Black Ownership	(Originally Certified ID Document)

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:

ANNEXURE 1: AUTHORITY TO SIGN THE BID DOCUMENT

AUTHORITY TO SIGN A BID

A. COMPANIES

If a Bidder is a company, a certified copy of the resolution by the board of directors, personally signed by the chairperson of the board, authorising the person who signs this bid to do so, as well as to sign any contract resulting from this bid and any other documents and correspondence in connection with this bid and/or contract on behalf of the company must be submitted with this bid, that is before the closing time and date of the bid

AUTHORITY BY BOARD OF DIRECTORS

By resolution passed by the Board of Directors on20.....

Mr/Mrs/Ms.....

...

(whose signature appears below) has been duly authorised to sign all documents in connection with this bid on behalf of

(Name of Company)

IN HIS/HER CAPACITY AS:

SIGNED ON BEHALF OF COMPANY:

.....
(PRINT NAME)

SIGNATURE OF SIGNATORY: **DATE:**

.....

WITNESSES: 1.....

2.....