



## REQUEST FOR QUOTATIONS

**RFQ NUMBER:** RFQ/SASSETA/2425121

**CLOSING DATE:** 09 September 2024

**TIME:** 15H00

**DESCRIPTION:** Appointment of a suitable and experienced academia, research institutes, and research consultancies to conduct research focusing on the following topic: The impact of integrating cyber and physical security systems in South Africa

**COMPULSORY BRIEFING:** Yes  No

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**FOR COMPLETION BY SERVICE PROVIDER:**

**NAME OF BIDDING COMPANY:** \_\_\_\_\_

**CONTACT PERSON:** \_\_\_\_\_

**CONTACT NUMBER:** \_\_\_\_\_

**CSD REGISTRATION NUMBER:** MAAA\_\_\_\_\_

**NB.: Bidders are required to return the SASSETA attached Standard Bidding (SBD) forms and not submit SBD forms from other entities.**

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***NB: If you receive any suspicious calls asking for payment to secure an award or that the outcome can be influenced in your favour, please immediately inform the SASSETA Anti-Corruption Hotline at 0800 204 143 for further investigations.***

## **DOCUMENTS IN THIS BID DOCUMENT PACK**

Bidders are to ensure that they have received all pages of this document, which consist of the following documents:

1. Terms of references
2. Invitation to Quote (SBD 1) (requires the attachment of proof of authority)
3. Pricing Schedule (SBD 3.3)
4. Bidder's Disclosure (SBD 4)
5. Preference Points Claim form in terms of Preferential Procurement Regulations 2022 (SBD 6.1).
6. Documents required for claiming Specific Goals
7. Submission Checklist

## **NB.: DOCUMENT SUBMISSION**

**Bidders are to complete and submit all Standard Bidding Documents (SBD) forms mentioned above from bullet 2 to 5.**

**Bidders must be registered on the National Treasury Central Supplier Database (CSD) by the closing date and time of this request for quotation. Bidders are to provide SASSETA with their CSD registration number.**

## 1. TERMS OF REFERENCE

### 1.1. INTRODUCTION AND BACKGROUND

- 1.1.1. SASSETA is classified as a schedule 3A Public Entity in terms of the Public Finance Management Act, (Act 1 of 999, as amended). The SETA is accountable to the Board (Accounting authority) and the Department of Higher Education and Training (DHET) (Oversight authority).

### 1.2. SASSETA's Strategic Plan

- 1.2.1. SASSETA's Strategic Plan (2021/22 – 2024/25) refers to the eight (8) outcomes of the National Skills Development Plan (NSDP) that the SETA should respond to namely:
- 2.2.1.1 Outcome 1: Identify and increase production of occupations in high demand,
  - 2.2.1.2 Outcome 2: Linking education and the workplace,
  - 2.2.1.3 Outcome 3: Improving the level of skills in the South African workforce,
  - 2.2.1.4 Outcome 4: Increase access to occupationally directed programmes,
  - 2.2.1.5 Outcome 5: Support the growth of the public college institutional type as a key provider of skills required for socio-economic development;
  - 2.2.1.6 Outcome 6: Skills development support for entrepreneurship and cooperative development.
  - 2.2.1.7 Outcome 7: Encourage and support worker-initiated training; and
  - 2.2.1.8 Outcome 8: Support career development services.
- 1.2.2. In a partial response to outcome 2 of the NSDP (i.e., Identification of occupations in high demand), the Skills Planning and Research department compiled the Research Agenda for the SETA as indicated in 2.1.4 below.
- 1.2.3. On the other hand, SASSETA utilises WSP data to analyse skills gaps (top-up skills) and occupational shortages (scarce skills). The WSP data is complemented with other sources of demographic, economic and labour market data. The said analyses informs the development of the Sectoral Priority Occupations and interventions (PIVOTAL) list. The PIVOTAL list is utilised to confirm the key skills development programmes of SASSETA as captured in the Annual Performance Plan (APP) and the Service Level Agreement (SLA) with the DHET.
- 1.2.4. The main purpose of this exercise is to improve productivity at different workplaces in the safety and security sector. Therefore, at the center of the skills planning mechanism is data, including WSP data as indicated above. Should data be inaccurate, it will contribute towards misinformation of the process of identifying and prioritising skills gaps and scarce skills in the sector.

### **1.3. PURPOSE**

- 1.3.1. SASSETA requires the services of suitable and experienced academia, research institutes, and research consultancies to conduct research focusing on the following topic: The impact of integrating cyber and physical security systems in South Africa.

### **1.4. SCOPE OF WORK**

- 1.4.1. Successful bidders will be required to conduct research with the following objectives:
  - 1.4.1.1. Investigating the relationship between physical security and cyber security
  - 1.4.1.2. To understand the skills needs for these security types
  - 1.4.1.3. To identify the mechanism to be implemented in improving productivity in the security industry
  - 1.4.1.4. To explore the appropriateness of the intervention design to reduce the hard-to-fill occupations.

### **1.5. REQUIRED DELIVERABLES**

- 1.5.1. The required deliverables will include:
  - 1.5.1.1. Inception report(s).
  - 1.5.1.2. Data collection instruments and the data sets; and
  - 1.5.1.3. Draft reports,
  - 1.5.1.4. Final reports
  - 1.5.1.5. Power-Point presentations, and
- 1.5.2. **Inception reports**
  - 1.5.2.1. Inception reports will provide details about:
    - 1.5.2.1.1. The research methodology to be utilised, including the main research methods, the sampling framework, proposed sources of data, procedures for data collection and analysis, and a draft (but detailed) table of contents; and
    - 1.5.2.1.2. The proposed research tools will be discussed with and approved by the Research unit of SASSETA before data collection commences.
- 1.5.3. **Data collection instruments and the data sets**
  - 1.5.3.1. An electronic copy of all data collection instruments, and the sector-specific data set will be submitted to SASSETA Research unit.
- 1.5.4. **Draft reports**
  - 1.5.4.1. The service provider to submit a draft report for SASSETA's review, and to incorporate suggestions and recommendations from SASSETA. more rounds of revisions may be required before final versions of final report can be produced.

### **1.5.5. Final reports**

1.5.5.1. Final approved reports will be submitted as follows:

- 1.5.5.1.1. One (1) electronic copy in PDF; and
- 1.5.5.1.2. Ms Word formats.

### **1.5.6. Power-Point presentations**

1.5.6.1. Final presentations of the overall findings and recommendations

## **1.6. SKILLS AND EXPERIENCE OF THE BIDDING COMPANY AND THE TEAM MEMBERS PROPOSED FOR THE ASSIGNMENT**

### **1.6.1. The Research methodology and report writing**

1.6.1.1. The bidders are expected to demonstrate a comprehensive understanding and experience in terms of approaches of undertaking research studies and outline research/evaluation design and methodology to be applied and demonstrate knowledge and experience in:

- 1.6.1.1.1. utilising qualitative and quantitative research methods;
  - a) the application of different data analysis methods; and
  - b) the production of research reports, with feasible recommendations.

### **1.6.2. The bidding company's experience**

1.6.2.1. The Bidding Company to attach a minimum of three (3) signed reference letters demonstrating experience in conducting research studies from different clients and must be on a client's letterhead with contact details.

### **1.6.3. Team Leader's qualification and experience**

1.6.3.1. The team leader should be in possession of the following qualifications and demonstrate the following experience:

- 1.6.3.1.1. A minimum of a master's degree in social sciences or other relevant disciplines. International qualifications must be verified by SAQA and a copy of letters confirming verification.
- 1.6.3.1.2. A minimum of four (4) or more research outputs published on the DHET Accredited Journals. The bidder to attach these four or more research articles with the proposal for SASSETA's

## **1.7. TIMEFRAMES FOR DELIVERY OF THE WORK**

1.7.1. The successful service provider will be expected to finish the work within 6 Months of the appointment.

## **1.8. PRICING**

1.8.1. Service Providers are requested to provide an all-inclusive cost of this project assignment on SBD 3.3

- 1.8.2. Where the contract requires the successful bidder to travel to a venue different from SASSETA, the following travel and disbursement processes will be undertaken:
  - 1.8.2.1. Claim travel mileage costs applicable to this contract as per the Department of Transport rates.
  - 1.8.2.2. Book only economy-class flights
  - 1.8.2.3. Book Group A hire cars, otherwise, Group B is to be used for Service Providers outside of Gauteng.
  - 1.8.2.4. Utilise cost-effective modes of transport such as Uber/Taxify/Gautrain or shuttle services when traveling to and from the airport.
  - 1.8.2.5. Book only Bed and Breakfast, Hotels, or other equivalent accommodations up to a Rand value of R1 400/ three (3) Star per night per person (including dinner, breakfast, and parking).
  - 1.8.2.6. Submit all applicable invoices/receipts for the travel undertaken and a Google map of the trip where travel by private car was undertaken for payment.
  - 1.8.2.7. All travel is to be approved by SASSETA before being undertaken.

## **1.9. ACCOUNTABILITY AND REPORTING**

- 1.9.1. The service provider will report directly to the Research and Skills Planning, Monitoring, Evaluation, and Reporting Department of SASSETA for the duration of the assignment.

## **1.10. CONDITIONS OF CONTRACT (GCC) (ANNEXURE A)**

- 1.10.1. Bidders are requested to initial each page of the General Conditions of Contract (GCC) (Annexure A) and submit their response to this Request for Quotations. The GCC will form part of the contract with the successful Bidder.

## **1.11. INTELLECTUAL PROPERTY**

- 1.11.1. The service provider will be contracting with SASSETA. All products and data of this project, in whatever format raw or analyzed, will be the confidential information for utilization by SASSETA. All information and documents, received from SASSETA or stakeholders, is to be kept confidential and may not be used or distributed in any format without the written approval of SASSETA. To this end, the service provider will be required to sign a confidentiality agreement within the Contract.

## **1.12. PROTECTION OF PERSONAL INFORMATION ACT**

- 1.12.1. All Service Providers are to take note of the implications of POPIA act and any other data privacy Act applicable that SASSETA complies to. In compliance to the act, please be advised that the following are applicable to the treatment of vendor information:
  - 1.12.1.1 All requested bid information will be solemnly utilized for the purpose of the bid evaluation processes. The vendor hereby consents the information provided as part of this bid will be utilized for supply chain processes of SASSETA and may be subject to multiple processing to enable the evaluation of this bid.
  - 1.12.1.2 The vendor consents that the information collected will be retained for the duration of the evaluation and archived for records management purposes. The information will be disposed as per the

SASSETA records management policies as prescribed by the national archives act. Furthermore, the information owner acknowledges that the information provided will be scanned into digital records which are retained on the SASSETA backup servers and that are replicated to backup media. SASSETA does confirm that the organization adopts industry best practice with regards to the safeguarding of digital records whether locally stored or retained in backup media.

1.12.1.3 SASSETA confirms that all submitted records will be retained in their original form and will not be altered with to preserve the quality and originality of the information provided.

1.12.1.4 SASSETA confirms that the Information Officer is duly responsible for vendor information provided and exercises stringent measures to ensure that information is secured and solemnly utilized for the purpose of use. No vendor records will be distributed or utilized for any processes outside the current bid that the information has been requested for.

### **1.13. PROPOSED SELECTION CRITERIA**

#### **1.13.1. Functionality Evaluation**

1.13.1.1 All proposals will be evaluated on the criteria provided in the table below. The proposals of all service providers will be rated on a scale of 0 to 1.

0: Required documents(s)/item(s) not submitted/Unacceptable.  
Does not meet the set criteria/ Weak, less acceptable.  
Insufficient for the requirement.

1: Very good. Above-average compliance with the requirement.  
Exceptional mastery of the requirement. Should ensure extremely effective performance.

The functionality table addresses the proposed technical approach and research methodology, as well as the suitability of the project team

ELEMENT	FUNCTIONALITY EVALUATION		FUNCTIONALITY WEIGHT	TOTAL SCORE
<b>Proposed technical approach and research / evaluation methodology of the bidder</b>	Rating out of 1	Evaluation criteria	35%	
Bidding Company to demonstrate comprehensive understanding and experience in terms of approaches of undertaking research studies and outline research/ evaluation design and methodology to be applied and demonstrate knowledge and experience in: <ul style="list-style-type: none"> <li>• utilising qualitative and quantitative research methods;</li> <li>• the application of different data analysis methods; and</li> <li>• the production of research reports, with feasible recommendations. <b>(35 Points)</b></li> </ul>	<b>Bidding Company to outline research/evaluation design and methodology to be applied</b>			
	0	Research / evaluation methodology and report writing details NOT included/ Short research / evaluation methodology and report writing details that does not relate to the full scope of work.		
The Bidding Company to attach three (3) or more signed reference letters demonstrating experience in conducting research studies from clients and must be on a client's letterhead with contact details. <b>(10 Points)</b>	<b>Reference letters for the work done previously</b>		10%	
	0	The bidder has NOT attached or attached less than three (less 3) reference letters.		
	1	The bidder has attached three (3) or more reference letters.	10%	
<b>Suitability of the project team leader</b>	<b>Qualifications &amp; Publications</b>		55%	
The project team leader must be in possession of a master's/Doctoral degree in social sciences or other relevant disciplines. <b>(15 points)</b>  <b>NB: Copies of certificates must be</b>	0	Certified copies of certificates or letter(s) confirming international qualification(s) not attached.		
	1	Certified copy of a PhD/ master's degree or higher in social sciences or conformation of an equivalent international qualification attached	15%	



<b>attached.</b> International qualifications must be verified by SAQA and a copy of letters confirming verification.				
The project team leader to demonstrate Four (4) or more research outputs published on the DHET Accredited Journals with the proposal for SASSETA's. The bidder to attach these four or more research articles. <u>The Bidder to record the reference number for the published journal. (40 points)</u>	<b>Publications in DHET accredited Journals</b>			
	<b>0</b>	The project team leader has completed less than three (less 4) published Articles in the Department of Higher Education and Training (DHET) accredited Journals.	40%	
	<b>1</b>	The project team leader has completed four (4) or more research published Articles in the Department of Higher Education and Training (DHET) accredited Journals		
<b>Total</b>			<b>100%</b>	

**Bidders need to obtain a minimum of 70% for functionality for them to be evaluated further on the 80/20 preference points system. Bidders who do not obtain the 70% functionality points will be disqualified from further evaluation.**

## PREFERENCE POINT SYSTEM

Evaluation Criterion on Price and Specific Goals	
Relative competitiveness of proposed price	80
Specific Goals	20
<b>TOTAL FOR PRICE AND PREFERENCE</b>	<b>100</b>

### 1.14. CONDITIONS FOR SELECTION/SHORTLISTING

- a. Price quoted to be valid for ninety (90) days from the closing date of RFQ;
- b. The quotations are to be submitted in PDF Format;
- c. The quotation to include the National Treasury Central Supplier Database (CSD) Supplier Number (MAAA .....)
- d. Price quoted must be firm and must be inclusive of VAT;
- e. A firm delivery period/date must be indicated;
- f. Fully signed and completed SBD 1, 3.3, 4, 6.1, to be submitted with the proposal.
- g. Quotations will be evaluated on:
  - Submission of mandatory documents,
  - Functionality requirements above,
  - meeting the specifications issued by the SASSETA,
  - The 80/20 preference point system for the rand value up to R1 000 000.00. 80 points will be allocated to price and 20 points will be allocated to specific goals.

### 1.15. SASSETA issues this bid invitation in good faith; however, it reserves the right to:

- Cancel the Purchase Order or delay the selection process at any time, without explanation,
- Not to select any of the respondents to this bid invitation, without explanation,
- Exclude certain services, without explanation,
- Enter into negotiation with a prospective service provider regarding any terms and conditions, including price(s), of a proposed contract, and
- Not to accept the lowest of any quotation, offer, or bid.

### 1.16. ADDRESS WHERE QUOTATIONS ARE TO BE SENT

- 1.16.1. The quotation and all supporting documents are to be submitted no later than **(09 September 2024)** at **(15H00)** on the letterhead of your business and to be emailed to **([jmalanga@sasseta.org.za](mailto:jmalanga@sasseta.org.za))**

## PART A - INVITATION TO QUOTE

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)					
BID NUMBER:	RFQ/SASSETA/2425121	CLOSING DATE:	09 September 2024	CLOSING TIME:	15H00
DESCRIPTION	Appointment of a suitable and experienced academia, research institutes, and research consultancies to conduct research focusing on the following topic: The impact of integrating cyber and physical security systems in South Africa				
<b>BID RESPONSE DOCUMENTS MAY BE SENT TO:</b>					
jmalanga@sasseta.org.za					
<b>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO</b>			<b>TECHNICAL ENQUIRIES MAY BE DIRECTED TO:</b>		
CONTACT PERSON	Jeani Malanga		CONTACT PERSON	Jeani Malanga	
E-MAIL ADDRESS	jmalanga@sasseta.org.za		E-MAIL ADDRESS	jmalanga@sasseta.org.za	
<b>SUPPLIER INFORMATION</b>					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	[TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN (FOR EMES &amp; QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]</b>					
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE <b>GOODS /SERVICES /WORKS OFFERED?</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER PART B:3 ]	
<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		
<b>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.</b>					

PART B

TERMS AND CONDITIONS FOR BIDDING

<b>1. BID SUBMISSION:</b>
<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. <b>ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.</b></p> <p>1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.</p> <p>1.4. <b>THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).</b></p>
<b>2. TAX COMPLIANCE REQUIREMENTS</b>
<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 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.**

**NAME OF SIGNATORY** .....

**SIGNATURE OF BIDDER:** .....

**N/B.:** If a Company has one director as listed on CSD, the one Director MUST sign these documents on behalf of the Company. Any other member of the Company will require a Company Resolution to be attached to this submission signed by the duly Authorised Director.

**N/B.:** If the Company has more than one Director as listed on CSD, a signed Company Resolution must be attached to confirm that the one Director can sign on behalf of the Company. Any other member of the Company will require a Company Resolution to be attached to this submission signed by the duly Authorised Directors.

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

**DATE:** .....

**PRICING SCHEDULE**  
**(Professional Goods)**

NAME OF BIDDER: .....

BID NO.: RFQ/SASSETA/2425121

CLOSING TIME: 15H00

CLOSING DATE: 09 September 2024

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

ITEM NO	DESCRIPTION	BID PRICE IN RSA CURRENCY **(ALL APPLICABLE TAXES INCLUDED)
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1. The accompanying information must be used for the formulation of proposals.
2. All costs must be included in the price, including all applicable taxes “value-added tax” (VAT), etc. (where applicable).

**Fixed costs**

No	Item	COST INCL. VAT (where applicable)
1.	Inception Report	R
2.	Literature review	R
3.	Presentation of findings and recommendations	R
4	First Draft report	R
5	Final Report	R
<b>TOTAL COST (INCL. OF VAT)</b>		R

Bidders are to complete the name and surname of the proposed team leader/project manager on this assignment and ensure that comprehensive CVs of this member is attached to the proposal as follows:

NO.	ROLE IN THE TEAM	NAME AND SURNAME (Bidders to indicate <u>one</u> (1) name per role below.	IS THE CV ATTACHED (circle the response below)	IS THE CERTIFICATE ATTACHED (circle the response below)
	1 X Project manager/ Team Manager		Yes/No	Yes/No

.....  
**Signature**

.....  
**Date**

.....  
**Position**

.....  
**Name of bidder**

**(MUST be signed by a duly Authorised Delegate. A signed Company Resolution must be submitted).**

**BIDDER’S DISCLOSURE**

**1. PURPOSE OF THE FORM**

- 1.1 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.
- 1.2 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 interest 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 the table below

Full Name	Identity Number	Name of State institution

**N/B. If more space required, Service providers are to copy this table onto their letterhead and provide information as per the table above**

- 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**

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 consortium<sup>1</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 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.

1 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**

(To be signed by a duly Authorised Delegate. A signed Company Resolution must be submitted).

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

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

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

**1. GENERAL CONDITIONS**

- 1.1 The following preference point systems are applicable to invitations to quote:
- the 80/20 system for requirements with a Rand value of up to R1 000 000 (all applicable taxes included).

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

The applicable preference point system for this quotation is the **80/20** preference point system.

- a) The lowest acceptable quotation will be used to determine the accurate system once quotations are received.

- 1.3 Points for this quotation (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:**

- 1.5 The maximum points for this quotation are allocated as follows:

	<b>POINTS</b>
<b>PRICE</b>	80
<b>SPECIFIC GOALS</b>	20
<b>Total points for Price and SPECIFIC GOALS</b>	<b>100</b>

- 1.6 **Failure on the part of a bidder to submit proof or documentation required in terms of this bid to claim points for specific goals with the quotation, will be interpreted to mean that preference points for specific goals are not claimed.**

- 1.7 The organ of state reserves the right to request a bidder, either before a quotation 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. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

### 3. POINTS AWARDED FOR PRICE

#### 3.1 THE 80/20 PREFERENCE POINT SYSTEMS

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

**80/20**

$$Ps = 80 \left( 1 - \frac{Pt - Pmin}{Pmin} \right)$$

Where

- Ps = Points scored for the price of the quotation under consideration  
 Pt = Price of the quotation under consideration  
 Pmin = Price of lowest acceptable quotation

#### 3.2 POINTS AWARDED FOR SPECIFIC GOALS

- 3.2.1 In terms of Regulations 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 quotation.
- 3.2.2 For the purposes of this quotation, the bidder 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 bid:

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

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

A The specific goals allocated points in terms of this bid	B Number of points allocated (80/20 system) (To be completed by the organ of state)	C Number of points claimed (80/20 system) (Service providers to indicate which specific goals they are claiming)
Black People Ownership (100%)	10	
Black Youth Ownership (at least 30%)	5	
The promotion of South African-Owned Enterprises	5	
<b>Total Points</b>	<b>20</b>	

**DECLARATION WITH REGARD TO COMPANY/FIRM**

3.3 Name of company/firm.....

3.4 Company registration number: .....

3.5 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]

3.6 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 quotation, 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 bidding process;
  - (b) recover costs, losses or damages it has incurred or suffered as a result of that person’s conduct;
  - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
  - (d) recommend that the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted 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.

<p>.....</p> <p><b>SIGNATURE(S) OF BIDDER(S)</b></p> <p><b>SURNAME AND NAME:</b> .....</p> <p><b>DATE:</b> .....</p> <p><b>ADDRESS:</b> .....</p> <p>.....</p> <p>.....</p> <p>.....</p>
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**DOCUMENTS REQUIRED FOR CLAIMING SPECIFIC GOALS**

1. As per bullet 1.6 and 1.7 of the Preference Points Claim Form in terms of the Preferential Procurement Regulations 2022, bidders are required to submit the SASSETA verification document(s) in order to be allocated the specific goals claimed:
  - a) An Original/Certified copy of a valid B-BBEE Certificate or Sworn Affidavit.
  - b) Valid Companies and Intellectual Property Commission (CIPC) Company registration documents
  - c) Certified copy/ies of Identity documents of the Company Directors
  - d) CSD report
  - e) medical report (if any)
  - f) declaration letter signed by the bidder.

**NB.: Non-submission of the documents required above will lead to specific goal points NOT being awarded.**

.....  
**Signature**

.....  
**Date**

.....  
**Position**

.....  
**Name of bidder**

(To be signed by a duly Authorised Delegate. A signed Company Resolution must be submitted).

**NB: If you receive any suspicious calls asking for payment to secure an award or that the outcome can be influenced in your favour, please immediately inform the SASSETA Anti-Corruption Hotline at 0800 204 143 for further investigations.**

**SUBMISSION CHECKLIST:**

NO.	DETAILS	TICK BY BIDDER
1.	<b>Part 1:</b> <ul style="list-style-type: none"> <li>• Completed and signed Invitation to Quote (SBD 1)</li> <li>• <b>(To be signed by a duly Authorised Delegate. A Company Resolution signed by all Directors of the Company must be submitted).</b></li> </ul>	
2.	<b>Part 2</b> <ul style="list-style-type: none"> <li>• Completed and signed Pricing Schedule (SBD 3.3).</li> </ul>	
3.	<ul style="list-style-type: none"> <li>• Part 3</li> <li>• Bidder's quotation on the company's letterheads with all applicable costs and delivery dates</li> <li>• Quotation MUST be in accordance with the specification. Quotation that is inconsistent with the specification will be disqualified.</li> </ul>	
4.	<b>Part 4:</b> <ul style="list-style-type: none"> <li>• Completed and signed declaration of interest document (SBD 4).</li> <li>• <b>(In case of a consortium/ joint venture, or where sub-Service providers are utilised, each party to the bid must complete and sign the declaration of interest document).</b></li> </ul>	
5.	<b>Part 5:</b> <ul style="list-style-type: none"> <li>• Completed and signed Preference Points Claim form in terms of Preferential Procurement Regulations 2022 (SBD 6.1).</li> <li>• <b>Not claiming points for each preference point system on SBD 6.1 will lead to specific goal points not being awarded</b></li> </ul>	
6.	<b>Part 6:</b> <ul style="list-style-type: none"> <li>• Bidders to submit their National Treasury Central Supplier Database (CSD) registration document.</li> </ul>	
7.	<b>Part 7: Bidder to submit</b> Bidders are to submit a General Conditions of Contract (GCC) document.	
8.	<b>Part 8:</b> <ul style="list-style-type: none"> <li>• Bidding Company to demonstrate comprehensive understanding and experience in terms of approaches of undertaking research studies and outline research/ evaluation design and methodology to be applied and demonstrate knowledge and experience</li> </ul>	
9.	<b>Part 9:</b> <ul style="list-style-type: none"> <li>• A minimum of three (3) signed reference letters demonstrating experience in conducting research studies from different clients and must be on a client's letterhead with contact details</li> </ul>	
10	<b>Part 10:</b> <ul style="list-style-type: none"> <li>• The project team leader must be in possession of a masters/Doctoral degree in social sciences or other relevant disciplines</li> <li>• The project team leader to demonstrate Four (4) or more research outputs published on the DHET Accredited Journals with the proposal for SASSETA's. The bidder to attach these four or more research articles</li> </ul>	
11	<b>Part 11 Bidders to submit:</b> <ul style="list-style-type: none"> <li>• <b>NB.: Non-submission of the below-mentioned documents (under 6) will lead to specific goal points NOT being awarded.</b></li> <li>• An original/Certified copy of a valid B-BBEE Certificate or Sworn Affidavit.</li> <li>• Valid company and Intellectual Property Commission (CIPC) Company registration.</li> <li>• Certified copy (ies) of identity documents of the Company directors.</li> </ul>	

**NB.: Bidders are required to return the SASSETA attached Standard Bidding (SBD) forms and not submit SBD forms from other entities.**

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