



## REQUEST FOR QUOTATIONS

**RFQ NUMBER:** RFQ/SASSETA/2425118

**CLOSING DATE:** 08 October 2024

**TIME:** 15H00

**DESCRIPTION:** Appointment of a pool/panel (maximum of two (2) Learning Material Developers to develop learning material for Occupational Qualifications/Part-Qualifications/Skills Programme learning material

**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. The Safety and Security Sector Education and Training Authority (SASSETA) is one of the twenty-one Sector Education and Training Authorities (SETAs) established in terms of the Skills Development Act (Act 97 of 1998) as amended. SASSETA's license has been renewed until 31st March 2030. SASSETA is classified as a Schedule 3A Public Entity in terms of the Public Finance Management Act, (Act 1 of 1999, as amended). SASSETA reports to the Department of Higher Education and Training.
- 1.1.2. The ETQA has signed a Memorandum of Understanding (MoU) with the Quality Council for Trades and Occupation (QCTO). Occupational qualifications have been re-aligned and approved by QCTO and therefore learning material need to be developed for the process of accreditation with the QCTO to take place. There is a need to appoint Learning Material Developers that will be working with SASSETA and stakeholders to develop the Occupational qualifications, Part-qualifications, or Skills Programmes learning material.

### **1.2. PURPOSE**

- 1.2.1. The purpose of this bid is to appoint a pool/panel (maximum of two (2) Learning Material Developers to develop learning material for Occupational Qualifications/Part-Qualifications/Skills Programme learning material.
- 1.2.2. Competent and experienced Learning Material Developers are needed to develop learning material for occupational qualifications' and comply with the QCTO curriculum documents. The appointed learning material developers will be allocated more than one Qualification/Part-Qualification/Skills Programme to develop learning material for, as per the needs of the sub-sectors (chambers) and in accordance with applications received from industry stakeholders.

### **1.3. SCOPE OF WORK**

- 1.3.1. The successful service providers will be required to undertake the following:
  - 1.3.1.1. Work within the occupational qualifications' framework,
  - 1.3.1.2. Capture data from stakeholders,
  - 1.3.1.3. Engage with the Development Quality Partners (DQP)
  - 1.3.1.4. Facilitate meetings with the identified Stakeholders and relevant Industry partners/experts,
  - 1.3.1.5. Prepare and submit reports to the ETQA Manager

### **1.4. REQUIRED DELIVERABLES**

- 1.4.1. For each module in the respective curriculum components, the following deliverables will be required from the Material Developer:

#### **1.4.1.1. Knowledge Modules:**

- 1.4.1.1.1. Learner Guide (content related to the curriculum)
- 1.4.1.1.2. Learner Activity Guide (which may be included in the learner guide)
- 1.4.1.1.3. Facilitator Guide (focusing on time allocation and resources)

- 1.4.1.1.4. Assessor Guide (including activities and model answers for formative assessment)
- 1.4.1.1.5. Moderator Guide

**1.4.1.2. Practical Skills Modules:**

- 1.4.1.2.1. Learner Activity Guide
- 1.4.1.2.2. Facilitator Guide (focusing on preparation of aids for the demonstration)
- 1.4.1.2.3. Assessor Guide (checklist for formative assessment)

**1.4.1.3. Work Experience Modules:**

- 1.4.1.3.1. Workplace Logbook
- 1.4.1.3.2. Mentor Guide
- 1.4.1.3.3. Learning matrix

**1.4.1.4. As per QCTO occupational qualification curriculum document**

1.4.2. Submission: Electronic copy

- 1.4.2.1. All material will be submitted in Microsoft Word and MS Excel format (as applicable)

**1.5. SKILLS AND EXPERIENCE OF THE BIDDING COMPANY AND THE TEAM MEMBER(S) PROPOSED FOR THE ASSIGNMENT**

1.5.1. The applicants should demonstrate the following skills and experience.

- 1.5.1.1. Submit a detailed methodology and project plan with a clear indication of timeframes milestones to be achieved and action plans.
- 1.5.1.2. Bidding company / Learning Material Developer to demonstrate three (3) learning materials developed for any SETA or Quality Assurance Body by submitting signed reference letter(s) with contact details confirming their satisfaction/approval on the learning material developed.
- 1.5.1.3. A detailed Curriculum vitae (CV) of the Learning Material Developer demonstrating three (3) years or more experience in developing learning material to be attached.

**1.6. MANDATORY REQUIREMENTS/ DISQUALIFICATION CRITERIA**

- 1.6.1. The Learning Material Developer to submit a certified copy of ETDP SETA learning programme developer statement of results (Unit standard 123394/123401) /OD ETD qualification (Qualification ID/ 50333/50334) / Any relevant education and training qualification that reflects learning material development as a part of the modules/subjects undertaken. **Non-submission will lead to disqualification.**

**NB. International qualifications must be verified by SAQA and a copy of letter confirming the validity of the qualifications must be attached. Certified copy should not be older than six (6) months.**

## 1.7. TIMEFRAME FOR DELIVERY OF THE WORK

- 1.7.1. This contract will be from the date of appointment until 30 April 2025.
- 1.7.2. The timeline allocated to develop one (1) occupational Qualification, Part-qualification, full/part-qualification, and Skills Programme should be concluded as follows:

Programme	Duration
Full Qualification	4-6 Months
Full/Part-Qualification	4-6 Months

## 1.8. PRICING

- 1.8.1. Bidders are to complete SBD 3.3 as attached to this request in full and to submit their own detailed quotation on their Company letterhead inclusive of VAT and any other costs as per the requirements of the Terms of Reference. **Bidders to attach their quotation on the company letterhead in line with SBD 3.3**
- 1.8.2. **The value of this bid is estimated not to exceed R1 000 000 (all applicable taxes included) and therefore the 80/20 system shall be applicable.**
- 1.8.3. **Where the contract requires the successful bidder to travel to a venue different from SASSETA, the following travel and disbursement processes will be undertaken:**
- Claim travel mileage costs applicable to this contract as per the Department of Transport rates
  - Book only economy-class flights
  - Book Group A hire cars, otherwise Group B are to be used for Service Providers outside of Gauteng.
  - Utilise cost-effective mode of transport such as Uber/Taxify/Gautrain or shuttle services when travelling to and from the airport
  - 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).
  - Submit all applicable invoices/receipts for the travel undertaken and also a google map of the trip where travel by private car was undertaken for payment.
  - All travel to be approved by SASSETA before being undertaken

## 1.9. ACCOUNTABILITY AND REPORTING

- 1.9.1. The Service Provider / Learning Material Developer will report directly to ETQA Manager and submit reports to SASSETA within seven (7) working days of completion of work.

## 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 analysed, will be confidential information for utilisation 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:
- 1.12.2. 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.
- 1.12.3. 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.
- 1.12.4. 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 information provided.
- 1.12.5. 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 document/item not submitted /Unacceptable, does not meet set criteria

1: Very good, above average compliance to the requirement

## PROPOSED SELECTION CRITERIA

ELEMENT	FUNCTIONALITY EVALUATION		FUNCTIONALITY WEIGHT	TOTAL SCORE
	Rating out of 1	Evaluation criteria		
Bidding company to submit a detailed methodology and project plan complying with timeframes and milestones indicated above, related costs and action plans.	0	Bidder did not submit a detailed methodology and project plan/detailed methodology and project plan does not have clear timeframes and is not aligned with the scope of work	30	
	1	Bidder submitted a detailed methodology and project plan with the indication of timeframes, milestones and related costs and action plans in accordance with SASSETA's scope of work.		
Bidding company / Learning Material Developer to demonstrate three (3) learning materials developed from any SETA or Quality Assurance Body by submitting signed reference letter(s) with contact details confirming their satisfaction/approval of the learning material developed.  <b>NB: Reference letters should be for either the individual or the bidding company and should specify the Qualification/Part-Qualification/Skills Programme that was developed previously.</b>	0	The bidding company / Learning Material Developer did not submit signed reference letter(s) demonstrating three (3) learning materials developed for any SETA or Quality Assurance Body/the bidding company/Learning material Developer submitted an unsigned reference letter.	40	
	1	The bidding company / Learning Material Developer submitted signed reference letters demonstrating three (3) learning materials developed for any SETA or Quality Assurance Body.		
A detailed Curriculum vitae (CV) of the Learning Material Developer demonstrating three (3) years or more experience in developing learning material to be attached.	0	The CV of the Learning Material Developer demonstrates less than three (3) years of experience in developing learning material.	30	
	1	The CV of the Learning Material Developer demonstrates three (3) or more years of experience in undertaking learning material development.		
<b>TOTAL SCORE</b>			<b>100%</b>	

Bidders need to obtain 100% for functionality for them to be evaluated further on the 80/20 preference points system. **Bidders who do not obtain the 100% functionality points will be disqualified from further evaluation.**

## PREFERENCE POINT SYSTEM

<b>Evaluation Criterion on Price and Specific Goals</b>	
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.

**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.

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

The quotation and all supporting documents are to be submitted no later than **(08 October 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

<b>YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)</b>					
BID NUMBER:	RFQ/SASSETA/2425118	CLOSING DATE:	08 October 2024	CLOSING TIME:	15H00
DESCRIPTION	<b>Appointment of programme developers who will develop learning material for the registered Occupational Qualifications/Part-Qualification/Skills Programmes</b>				
<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 GOODS /SERVICES /WORKS OFFERED?	<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**

<p><b>1. BID SUBMISSION:</b></p> <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>
<p><b>2. TAX COMPLIANCE REQUIREMENTS</b></p> <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.: <b>RFQ/SASSETA/2425118</b>
CLOSING TIME: <b>15H00</b>	CLOSING DATE: <b>08 October 2024</b>

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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- The accompanying information must be used for the formulation of proposals
- All costs must be included in the price, including all applicable taxes "value-added tax" (VAT), etc. (where applicable).

**Fixed costs**

**NB: Bidders MUST complete this amount on this document, and it MUST be the same as the total amount on the quotation incl. VAT. (where applicable)**

No	Item	COST INCL. VAT (where applicable)
1.	Cost for developing material for one (1) full occupational qualification (with credits ranging between 120 to 390)	R
2.	Cost for developing material for one (1) full occupational qualification and part Qualification material (with credits ranging from 120 to 390)	R
<b>TOTAL COST (INCL. OF VAT)</b>		<b>R</b>

Bidders are to complete the name and surname of the proposed Learning Material Developer on this assignment and ensure that comprehensive CV is attached.

NO.	ROLE IN THE TEAM	NAME AND SURNAME (only one name to be provided)	IS CV ATTACHED (Circle the response below)
1.	Learning Material Developer		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.
- 3.1 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.
- 3.2 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.
- 3.3 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.
- 3.4 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.

<sup>1</sup> Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

.....  
**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

### 2.1 POINTS AWARDED FOR PRICE

#### 2.1.1 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

### 2.2 POINTS AWARDED FOR SPECIFIC GOALS

2.2.1 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.

2.2.2 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.)**

The specific goals allocated points in terms of this bid	Number of points allocated (80/20 system)	Number of points claimed (80/20 system) (To be completed by the bidder)
Black People owned (at least 51%)	10	
The promotion of South African -owned enterprises	2	
The promotion of enterprises located in a specific province for work to be done or services to be rendered in that region.	3	
Black Women Ownership (at least 30%)	5	
<b>Total Points</b>	<b>20</b>	



**DECLARATION WITH REGARD TO COMPANY/FIRM**

2.3 Name of company/firm.....

2.4 Company registration number: .....

2.5 TYPE OF COMPANY/ FIRM

- Y Partnership/Joint Venture / Consortium
  - Y One-person business/sole propriety
  - Y Close corporation
  - Y Public Company
  - Y Personal Liability Company
  - Y (Pty) Limited
  - Y Non-Profit Company
  - Y State Owned Company
- [TICK APPLICABLE BOX]

2.6 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.

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

**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 Bidder's Disclosure 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 submit a detailed methodology and project plan complying with timeframes and milestones, related costs, and action plans.</li> </ul>	
9.	<b>Part 9:</b> <ul style="list-style-type: none"> <li>• Bidding company / Learning Material Developer to demonstrate three (3) learning materials developed from any SETA or Quality Assurance Body by submitting signed reference letter(s) with contact details confirming their satisfaction/approval of the learning material developed.</li> </ul>	
10.	<b>Part 10:</b> <ul style="list-style-type: none"> <li>• A detailed Curriculum vitae (CV) of the Learning Material Developer demonstrating three (3) years or more experience in developing learning material to be attached</li> </ul>	
11.	<b>Part 11:</b> <ul style="list-style-type: none"> <li>• Bidding company/learning material developer to submit a certified copy of ETDP SETA learning programme developer statement of results (Unit standard 23394/123401) /OD ETD qualification (Qualification ID/ 50333/50334) / Any relevant education and training qualification that reflects learning material development as a part of the modules/subjects undertaken. <b>Non-submission will lead to disqualification</b></li> </ul>	
12.	<b>Part 12 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 <u>NOT</u> 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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