



**QUOTATION NUMBER**

**DOT-IHC-24/25-014**

**FOR**

**APPOINTMENT OF OCCUPATIONAL HEALTH AND SAFETY  
SPECIALIST TO CONDUCT MEDICAL SURVEILLANCE FOR  
R72-HAMBURG PROJECT.**

**NAME OF BIDDER:** \_\_\_\_\_

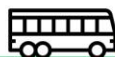
**CSD NUMBER:** \_\_\_\_\_

**PRACTISE No.** \_\_\_\_\_

**CLOSING DATE: 11 September 2024**

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Issued by:  
Supply Chain Management Unit  
Department of Transport  
Private Bag x 714  
GRAAFF-REINET  
6280



## INVITATION TO QUOTE

QUOTATION NUMBER: DOT-IHC-24/25-014

**CLOSING DATE: 11 September 2024**

**Time: 11H00**

Quotations are hereby invited by the Department of Transport for **APPOINTMENT OF OCCUPATIONAL HEALTH AND SAFETY SPECIALIST TO CONDUCT MEDICAL SURVEILLANCE FOR R72-HAMBURG PROJECT** from prospective bidders (SMMEs).

Quotation documents will be available as from as from the **27 August 2024** at **09h00** at the offices of The Department of Transport Supply Chain Office.

The completed RFQ (Request for Quotation) must be placed in a sealed envelope, clearly marked with the Quote Number and the Nature of the Service, and be deposited in the Bid Box situated at Department of Transport, **1 Reynolds Street, Industrial Area, Grahamstown, not later than 11H00 on 11 September 2024.**

***Electronic, telegraphic, facsimile, and late tenders will not be accepted. Tenders may only be submitted on the tender documentation that has been issued.***

It is the responsibility of the bidder/s to ensure that bid documents /proposals are submitted on or before closing time and the correct location as the department will not take responsibility of wrong delivery. Bidders using courier services for delivery of their bid documents must ensure the delivery is at the correct place / location and time as the department will not be held responsible for wrong delivery.

Tenders may only be submitted on the tender documentation that is issued. Tenderers must be registered on the Central Supplier Data Base (CSD) for the South African government ( see <https://secure.csd.gov.za/> ) unless it is a foreign supplier with no local registered entity

## A. EVALUATION CRITERIA

### **BIDDERS SHALL TAKE NOTE OF THE FOLLOWING BID CONDITIONS AND STAGES OF EVALUATION:**

Stage 1 -	Compliance
Stage 2 -	Price Points & Specific goals

#### **Stage 1 - Compliance**

**Please note bidders who do not comply with the following requirements will not be moving to the second stage. Tenderers must take particular note of the following:**

“Only those tenderers who satisfy the following criteria are eligible to submit tenders:

- Bidders are required to be registered with Centralized Suppliers Database [CSD] with Treasury prior to submit this quote.
- The SDB'S 1, 3.1, Bid pricing form, 4, 6.1, 7.2 forms **MUST** be fully completed and submitted with the quotation;
- Bidders must be legal entity or partnership (consortium);
- Bidders must provide supporting documentation as per the Quotation specification schedule requirement;
- Bidders who are not registered for VAT are not eligible to claim VAT in their pricing;
- Bidders should take note that price is not a determining factor to award the Quotation.
- Bidders Particulars form **MUST** be fully completed by Bidders.
- **Pricing Schedule and Bid Pricing Form, MUST be fully completed failure to do so will render the bidder non-responsive.**
- **Bidders are required to submit a copy of Valid Letter of Good Standing from the compensation Commissioner or FEMA with the document and failure to do will render the bid non-responsive.**
- ***Attached a proof of valid professions registration with SOSOM (South African Society of occupation medicine) and failure to do so will render the quotation non-responsive.***
- The tender will be evaluated according to the preferential procurement model in the preferential Procurement Policy Framework Act (PPPFA 5 of 2000): Preferential Procurement Regulations, 2022 as well as the SCM Policy of the Department of Transport.
- **The amount reflected on the Bid Pricing Form takes precedence over any other total amount indicated elsewhere in the Bidders tender submission. If the Bid Pricing Form has no value or figure, the bidder will be regarded as having made no offer and therefore non-responsive**
- **The tender must be in good standing with SARS as verified on the Central Supplier Database. “Bidders must note that in addition to being tax compliant at the time of award of the contract, which will be verified with SARS or the CSD, it is incumbent upon the successful bidder/s to ensure that they are at all times tax compliant over the entire duration of the contract. Failure to ensure tax compliance may prevent the Department/Public Entity from issuing orders when goods/services are required. In such instances, the Department/Public Entity reserves the right to procure outside of the contract. Furthermore, if the Department/Public Entity is prevented from obtaining the relevant goods/services on the contract, such constitutes a breach of contract and will be dealt with accordingly, including the recovery of damages/adverse costs where applicable”.**

**Furthermore, quotation offers will only be accepted if:**

- Bidders are registered with Central Supplier Database (CSD) with Treasury prior to submitting this RFQ (see <https://secure.csd.gov.za/>).
- The tenderer is in good standing with SARS as verified on the Central Supplier Database.

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- The tenderer or any its directors or shareholders is not listed on the register of tender defaulters in terms of the prevention and compacting of corrupt activities Act of 2004 as a person prohibited from doing business within the public sector.
- The tenderer has not abused the employers Supply Chain Management System or failed to perform on any previous contract and has been given written notice to this effect.
- All quotations shall be held valid for 60 days after the closing date. The Department reserves the right not to accept the lowest or any tender.
- It is the responsibility of the bidder/s to ensure that bid documents /proposals are submitted on or before closing time and the correct location as the department will not take responsibility of wrong delivery.

**Stage 2 - Price points & B-BBEEE**

**Please note that bidders who make it to this stage will automatically proceed through to the following stage.**

1. The following criteria shall apply:-
  - The tender will be evaluated according to the preferential procurement model in the preferential Procurement Policy Framework Act (PPPFA 5 of 2000): Preferential Procurement Regulations, 2022 as well as the SCM Policy of the Department of Transport.
- 1.1. **Price:**
  - 80 points will be awarded to the bidder submitting the lowest price (all other bidders will receive points proportionately thereto):
- 1.2. **Calculation of points for specific goals**
  - 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

<b>PREFERENTIAL SPECIFIC GOALS POINTS TABLE</b>		
<b>The specific goals allocated points in terms of this tender</b>	<b>Number of points allocated (80/20 system) (To be completed by the organ of state)</b>	<b>Number of points claimed (80/20 system) (To be completed by the tenderer)</b>
<b>Historically Disadvantaged Individuals</b>		
(a) black ownership	7	
<b>Women ownership:-</b>		
(b) women ownership	2	
<b>Youth ownership:-</b>		
(c) youth ownership	4	

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<b>People with Disability:-</b>		
(d) % or more disabled people ownership	2	
<b>Locality:-</b>		
(e) Within the Eastern Cape	5	

**NB points for Specific goals A to E shall be calculated according to the percentage ownership on each category as it appears on CSD.**

**1.3. Bidders are required to submit, together with their bids, the following:**

Points for specific goal (a) to (d) shall be calculated according to the percentage ownership on each category as it appears on Cipro certificate and ID copy.

- 1.3.1. Service providers must submit proof of its Specific Goals points claimed / status of contributor.
- 1.3.2. The Specific Goals supporting documents required to verify claimed points may in-line with the specified requirements include:

- Disability Ownership: valid medical documentary proof.
- For locality, preferred address on CSD will be used.

\* **The Central Supplier Database will be used to verify the specific goals other than the specific goals stated under paragraph 1.3**

**Enquiries should be directed to:**

**Technical Enquiries: Noluntu Funani**

**Telephone number: 066 381 7873**

**Email: [Noluntu.Funani@ectransport.gov.za](mailto:Noluntu.Funani@ectransport.gov.za)**

**Supply Chain Management: Thandi Mafani**

**Telephone number: 072 690 1534**

**Email: [Thandi.Mafani@ectransport.gov.za](mailto:Thandi.Mafani@ectransport.gov.za)**

**FOR COMPLAINTS, FRAUD, & TENDER ABUSE:**

**Call: 0800 701 701**

## SPECIFICATION FOR A SERVICE PROVIDER

### 1. SPECIFICATION AND SCOPE OF WORK

**The Service Provider should take note of the following conditions:**

#### **Client's Requirements**

The Department of Transport's In House Construction unit is looking for the services to render Occupational Health and Safety Medical Surveillance for the R72-Hamburg Project.

#### **Contractor's / Tenderer's Responsibility**

The Contractor / Tenderer shall be responsible for the following;

- Bidder to ensure that rates include all resources (Transportation, Equipment and Personnel, etc.) needed to successfully complete the works.
- Ensure all the necessary equipment is available when they visit the site for the services e.g (generator for electricity when there is load shedding)

#### **Measurement and payment**

- Payment will be made within 60 days after the client representative has certified works being claimed for as completed to the required quality standard.
- Tenderer's rate shall **include** material procurement and labour.
- The unit of measurement shall as per the BOQ.
- For payments a successful service provider should attach proof work done signed on the provider's company template with and co-signed by the DOT rep as a confirmation of work completed.

**PART A  
INVITATION TO BID**

<b>YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE DEPARTMENT OF TRANSPORT</b>					
BID NUMBER:	DOT-IHC-24/25- 014	CLOSING DATE:	11 September 2024	CLOSING TIME:	11:00
DESCRIPTION	<b>APPOINTMENT OF OCCUPATIONAL HEALTH AND SAFETY SPECIALIST TO CONDUCT MEDICAL SURVEILLANCE FOR R-72 PROJECT.</b>				
<b>BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)</b>					
<b>Department of Transport</b>					
<b>1 Reynolds Street</b>					
<b>Industrial Area</b>					
<b>Makhanda / Grahamstown</b>					
<b>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO</b>			<b>TECHNICAL ENQUIRIES MAY BE DIRECTED TO:</b>		
CONTACT PERSON	<b>Thandi Mafani</b>		CONTACT PERSON	<b>Noluntu Funani</b>	
TELEPHONE NUMBER	<b>061 312 5852</b>		TELEPHONE NUMBER	<b>066 381 7873</b>	
FACSIMILE NUMBER			FACSIMILE NUMBER		
E-MAIL ADDRESS	<b>Thandi.Mafani@ectransport.gov.za</b>		E-MAIL ADDRESS	<b><a href="mailto:Noluntu.Funani@ectransport.gov.za">Noluntu.Funani@ectransport.gov.za</a></b>	
<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
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]	
<b>QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS</b>					
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?			<input type="checkbox"/> YES <input type="checkbox"/> NO		
DOES THE ENTITY HAVE A BRANCH IN THE RSA?			<input type="checkbox"/> YES <input type="checkbox"/> NO		
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?			<input type="checkbox"/> YES <input type="checkbox"/> NO		
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?			<input type="checkbox"/> YES <input type="checkbox"/> NO		
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?			<input type="checkbox"/> YES <input type="checkbox"/> NO		
<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>					

**SBD1**

**PART B  
TERMS AND CONDITIONS FOR BIDDING**

<b>1. BID SUBMISSION:</b>
1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
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>
1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
1.4. <b>THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).</b>
<b>2. TAX COMPLIANCE REQUIREMENTS</b>
2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA
2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

**NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.**

SIGNATURE OF THE BIDDER:  
.....

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

DATE:  
.....



**PRICING SCHEDULE – FIRM PRICES  
(PURCHASES)**

**NOTE: ONLY FIRM PRICES WILL BE ACCEPTED. NON-FIRM PRICES (INCLUDING PRICES SUBJECT TO RATES OF EXCHANGE VARIATIONS) WILL NOT BE CONSIDERED**

**IN CASES WHERE DIFFERENT DELIVERY POINTS INFLUENCE THE PRICING, A SEPARATE PRICING SCHEDULE MUST BE SUBMITTED FOR EACH DELIVERY POINT**

Name of bidder.....	Bid number: <b>DOT-IHC-24/25-014</b>
Closing Time <b>11:00</b>	Closing date: 11 September 2024

OFFER TO BE VALID FOR 60 DAYS FROM THE CLOSING DATE OF BID.

<b>PRICING SCHEDULE</b>					
<b>APPOINTMENT OF OCCUPATIONAL HEALTH AND SAFETY SPECIALIST TO CONDUCT MEDICAL SURVAILLANCE FOR R72-HAMBURG PROJECT.</b>					
<b>ITEM</b>	<b>DESCRIPTION OF GOODS/SERVICES</b>	<b>Unit</b>	<b>Qty</b>	<b>Rate /unit price</b>	<b>Amount</b>
<b>TESTS TO BE CONDUCTED</b>					
	<b>Tests to be conducted: (in 1, 2 ,3, 4, and 5)</b> <ul style="list-style-type: none"> <li>Chest X-Rays</li> <li>TB-GeneXPERT</li> <li>SPT/Lung Function</li> <li>HGT Test</li> <li>Audiometry</li> <li>Elisa &amp; HIV/AIDS</li> <li>TB Testing</li> <li>DVS vision Screening</li> </ul>				
1	Exit medical (2024)	No.	18		
2	Periodic Systematic Examinations for permanent employees	No.	07		
3	Initial/Entry medicals	No.	22		
4.	Exit medicals (2025)	No.	22		
5.	Complete and submit Annual Medical Report (Mine & Health Safety Act No 29 of 1996 Sec 2(1) and Sec 16 to Department of Mineral Resources (DMR) and DOT	No.	69		

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7.	Complete Health Incident Report (HIR) and submit to DMR and DOT.	No.	69		
2.	<b>Transport Costs</b>	Km			
	<b>Sub-Total</b>				
	Vat 15% [only if eligible and registered]				
	<b>TOTAL AMOUNT OF TENDER</b>				

# BID PRICING FORM

For ease of reference, Bidders shall enter their Bid Price, copied from the Pricing Schedule, in the space provided below. Should there be any discrepancy, then the sum calculated from the Pricing Schedule, subject to any arithmetic correction, shall hold precedence.

**Total Price (amount in words):**

.....

.....

....., inclusive of VAT

**Total Price (amount in figures)**

R ....., inclusive of VAT

**NAME OF BIDDER:**

.....

**SIGNED ON BEHALF OF THE BIDDER:**

.....

### 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 interest<sup>1</sup> in the enterprise, employed by the state? **YES/NO**

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

Full Name	Identity Number	Name of State institution

2.2 Do you, or any person connected with the 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:  
.....  
.....

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.

**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>2</sup> will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the 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.
- 3.4 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.
- 3.5 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.
- 3.6 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

---

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

**DECLARATION OF EMPLOYEES OF THE STATE OR OTHER STATE INSTITUTIONS**

**1.** In terms of section 30 of the Public Service Act;  
 No employee shall perform or engage himself or herself to perform remunerative work outside his or her employment in the relevant department, except with the written permission of the executive authority of the department.

**2.**

Are any of the shareholders/ directors of your company employed by the State?	Yes/No
---	--------

**3.** “State” means –

- (a) Any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);
- (b) Any municipality or municipal entity;
- (c) Any provincial legislature;
- (d) national Assembly or the national Council of provinces; or
- (e) Parliament.
- (f) Any Parastatal (A company or agency owned or controlled wholly or partly by the government).

**4.** Should you indicate “yes” above, please provide the following details:

No	NAME & SURNAME OF DIRECTOR	STATE INSTITUTION WHERE EMPLOYED	ID NUMBER	EMPLOYEE/ PERSAL NUMBER
1				
2				
3				
4				
5				

**5. Please note: The “state” is clearly defined in paragraph 3 above. In the event that “no” is selected and subsequently any false declaration are detected, the non-disclosure of such “state employment” will be deemed as “fraud”. Therefore, the state may reject the Quotation and in addition may proceed with further action should this declaration prove to be false.**

**6. DECLARATION**

I, (NAME & SURNAME).....ID NUMBER.....

CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 2 AND 4 ABOVE IS CORRECT.

.....  
 Signature

.....  
 Date

.....  
 Position

.....  
 Name of Bidder



## 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

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

*(delete whichever is not applicable for this tender).*

- a) The applicable preference point system for this tender is the 80/20 preference point system.
- b) Either the 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.

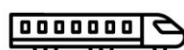
### 1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

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

1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this 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 PREFERENCE POINT SYSTEMS

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

**80/20**

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

Where

- Ps = 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 points is allocated for price on the following basis

**80/20**

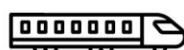
$$Ps = 80 \left( 1 + \frac{Pt - P \max}{P \max} \right)$$

Where

- Ps = Points scored for price of tender under consideration
- Pt = Price of tender under consideration
- Pmax = Price of highest acceptable tender



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#### 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 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 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 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 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 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.)***



PREFERENTIAL SPECIFIC GOALS POINTS TABLE		
The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
<b>Historically Disadvantaged Individuals</b>		
(a) black ownership	7	
<b>Women ownership:-</b>		
(b) women ownership	2	
<b>Youth ownership:-</b>		
(c) youth ownership	4	
<b>People with Disability:-</b>		
(d) % or more disabled people ownership	2	
<b>Locality:-</b>		
(e) Within the Eastern Cape	5	

### 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:** .....

.....

.....

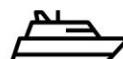


## CONTRACT FORM - RENDERING OF SERVICES

**THIS FORM MUST BE FILLED IN DUPLICATE BY BOTH THE SERVICE PROVIDER (PART 1) AND THE PURCHASER (PART 2). BOTH FORMS MUST BE SIGNED IN THE ORIGINAL SO THAT THE SERVICE PROVIDER AND THE PURCHASER WOULD BE IN POSSESSION OF ORIGINALLY SIGNED CONTRACTS FOR THEIR RESPECTIVE RECORDS.**

### PART 1 (TO BE FILLED IN BY THE SERVICE PROVIDER)

1. I hereby undertake to render services described in the attached bidding documents to (name of the institution)..... in accordance with the requirements and task directives / proposals specifications stipulated in Bid Number..... at the price/s quoted. My offer/s remain binding upon me and open for acceptance by the Purchaser during the validity period indicated and calculated from the closing date of the bid.
  
2. The following documents shall be deemed to form and be read and construed as part of this agreement:
  - (i) Bidding documents, viz
    - Invitation to bid;
    - Proof of tax compliance status;
    - Pricing schedule(s);
    - Filled in task directive/proposal;
    - Preference claim form for Preferential Procurement in terms of the Preferential Procurement Regulations;
    - Bidder's Disclosure form;
    - Special Conditions of Contract;
  - (ii) General Conditions of Contract; and
  - (iii) Other (specify)
  
3. I confirm that I have satisfied myself as to the correctness and validity of my bid; that the price(s) and rate(s) quoted cover all the services specified in the bidding documents; that the price(s) and rate(s) cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.



4. I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this agreement as the principal liable for the due fulfilment of this contract.
5. I declare that I have no participation in any collusive practices with any bidder or any other person regarding this or any other bid.
6. I confirm that I am duly authorised to sign this contract.

NAME (PRINT) .....

CAPACITY .....

SIGNATURE .....

NAME OF FIRM .....

DATE .....

WITNESSES	
1	.....



## CONTRACT FORM - RENDERING OF SERVICES

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

1. I..... in my capacity as..... accept your bid under reference number .....dated.....for the rendering of services indicated hereunder and/or further specified in the annexure(s).
  
2. An official order indicating service delivery instructions is forthcoming.
  
3. I undertake to make payment for the services rendered in accordance with the terms and conditions of the contract, within 30 (thirty) days after receipt of an invoice.

<u>DESCRIPTION OF SERVICE</u>	PRICE (ALL APPLICABLE TAXES INCLUDED)	COMPLETION DATE	TOTAL PREFERENCE POINTS CLAIMED	POINTS CLAIMED FOR EACH SPECIFIC GOAL

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



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

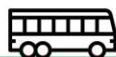
NAME (PRINT) .....

SIGNATURE .....

OFFICIAL STAMP

WITNESSES

1 .....



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## GENERAL CONDITIONS OF CONTRACT

- The latest General Conditions of Contract [GCC] and Contract Law shall be applicable to this Quotation and obtainable by visiting the National Treasury website at [www.treasury.gov.za](http://www.treasury.gov.za)
- Bidders must familiarize themselves with these GCCs

