basic education

Department:
Basic Education
REPUBLIC OF SOUTH AFRICA

TERMS OF REFERENCE FOR APPOINTMENT OF A SERVICE PROVIDER OR CONSORTIUM OF SERVICE PROVIDERS FOR TABLEAU BUSINESS INTELLIGENCE AND MAINTENANCE SERVICES FOR TWELVE MONTHS (12) PERIOD FROM 01 DECEMBER 2026 to 30 NOVEMBER 2027.

1. AIM

To appoint a suitable service provider or Consortium of Service Providers for the installation, configuration, maintenance, support, and annual renewal of licenses and the maintenance of the Business Intelligence and SQL server systems and data for the Department of Basic Education (DBE) over a twelve-month (12) period.

2. BACKGROUND

The Department of Basic Education (DBE) in the previous year appointed the service provider on a twelve-month contract, and the contract comes to an end on 30 November 2025.

3. SCOPE OF WORK

The Service Provider or Consortium will be required to supply the identified deliverables as per the scope of work: Installation, Configuration, Maintenance, and Support of Tableau Business Intelligence Software systems.

3.1. **Licenses**

3.1.1. 3 x Desktop Professional Developer Licenses (Tableau Creator)

3.1.2. 10 x Web Interactor Server Licenses (Tableau Explorer)

3.1.3. Licenses must include Tableau Prep

3.2. **Services (Maintenance & Support)**

3.2.1. Installation, Configuration, Maintenance & Support of Tableau Software

3.2.2. Installation, Configuration, Maintenance & Support of Business Intelligence SQL Server environment and data.

3.2.3. Advise hardware requirements and maintain initial installation and configuration of the Tableau server.

3.2.4. Advise and implementation of the security model

3.2.5. Advise and set up the development, testing, and production environment

3.2.6. Install Licenses.

3.2.7. Support the user with the definition of the Requirements gathering strategy.

3.2.8. Review of source operational systems

3.2.9. Support with the design of the logical data model, Data Governance, Data Quality, and the information delivery framework

3.2.10. Assist with the overall architecture, supporting infrastructure, and installation of infrastructure hardware and software

3.2.11. Assist with the selection and installation of DBMSs (Consolidated Data Mart) and ETL, and completion of the physical data model

3.2.12. Have in-depth Knowledge of SQL Server and Tableau Server (3 years or more)

3.2.13. Completion of user acceptance testing

3.2.14. Ongoing monitoring of data solution and performance tuning

3.2.15. Ongoing user training and support

3.2.16. Ongoing support with data management and infrastructure configuration

3.3. **Three Training Sessions:**

3.3.1. Advanced Training and support for the Tableau Developers

3.3.2. Training for the end user

3.3.3. Training should focus on all areas as per the scope.

3.3.4. Training should be face-to-face for Phase 1 (as outlined in Paragraph 4), and the Project manager will determine the subsequent training sessions as to whether it will be virtual or faceto-face.

3.4. **Experience Required**

3.4.1. Experience in Tableau:

a. Converting source data (flat files and server-based data sources) into Tableau data sources to be used in reports and data sources

b. Analyzing the Business requirement and creating a Business Requirement Specification document that can be used to build the requirement in Tableau

c. Tableau Desktop

i. Scoping, Developing, and Maintaining business critical reports and dashboards

d. Tableau Server

i. Configuration and maintenance of Tableau Server environment.

ii. Setting up and maintaining security and permissions of the Tableau Server environment (as well as the contents on the server)

iii. Maintaining Accessibility and sharing of Reports and Dashboards published to the Tableau server

3.4.2. Experience in Microsoft SQL Server:

e. T-SQL Scripting

i. Creating Microsoft SQL Server objects, such as:

1. Schemas
2. Stored Procedures
3. Tables
4. Views
5. Functions (scalar as well as table functions) ii.

Database Maintenance, configuration, and optimization. This includes the implementation of archive solutions. The solution needs to be able to handle large volumes of data (e.g. millions of records per reporting period)

3.4.3. ETL (Extract, Load, Transform) Solution - SQL Server Integration Services (SSIS)

f. Building of ETL packages to Extract, Load, and Transform data on specific Business Requirements

g. Automation of ETL packages

4. PROJECT EXECUTION, DELIVERABLES AND TIME-FRAMES

The Service Provider or Consortium will be expected to deliver the identified deliverables within the DBE ICT environment.

4.1. Phase 1: Developing, Configuring, and Maintaining Tableau Software and License

4.2. Phase 2: The Implementation processes (Data manipulation, training, and management)

4.3. Phase 3: Reporting and Monitoring on the Performance of the source operation

4.4. A written monthly report should be submitted to the Department for each of the above phases.

5. DURATION OF THE PROJECT

The project will be in three phases over twelve months.

6. BIDDING REQUIREMENTS

6.1. **Mandatory requirements**

The bidders must comply with the following mandatory requirements:

6.1.1. Bidders must be accredited resellers of Tableau or must have a referral agreement with the accredited reseller.

6.1.2. Bidders must provide a total price inclusive of VAT for the project, and the price should be fixed for the full duration of the project.

6.1.3. Alteration of the Standard Bidding Documents (SBD forms) will lead to disqualification.

Bidders who do not comply with all of the above mandatory requirements will be disqualified.

6.2. **Non-Mandatory Requirements**

6.2.1. Bidders should return all fully completed and signed attached SBD forms (SBD1, SBD4, and SBD6.1). Non-submission of the SBD6.1 form will result in non-allocation of specific goals.

6.2.2. In case of a Consortium or Joint Venture, Bidders should individually submit the fully completed and signed SBD forms separately.

6.2.3. If Bidding as a Consortium or Joint venture, the Consortium or Joint Venture must provide the following information and documents:

i. The agreement signed by nominated members of both/ all consortium or joint venture partners; ii. State the leading company;

6.2.4. If bidding with the intention of subcontracting certain tasks the bidder must state, the name of the subcontract Company and the percentage to be subcontracted.

7. PRICE AND PREFERENCE POINTS (80/20)

Bids will be evaluated in terms of 80/20 preference point system where 80 points will be used for *price only* and 20 points for DBE specific goals. (Refer to attached SBD 6.1 form).

The following formula will be used for the calculation of price:

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

Ps= Points scored for price of bid under consideration
Pt= Rand value of acceptable bid under consideration
Pmin= Rand value of lowest bid

Points Awarded for Specific Goals
A maximum of 20 points will be awarded to a tenderer for the specific goals of people who were historically disadvantaged by unfair discrimination on the basis of being Black, Women, Living with disability, or Youth.

Note to Bidders:

1. ***The bidder must indicate how they claim points for each preference point system.***
2. ***Allocation of points will be prorated as per percentage of ownership of each goal. In case of a Joint Venture or a Consortium, the points will be averaged***
3. ***DBE will verify the ownership percentage using CSD report, should there be discrepancies CSD report takes precedence.***
4. **Specific goals for the tender and points claimed are indicated per the table below**

The specific goals allocated points in terms of this tender	**Number of points allocated (80/20 system)**	**Documents required as proof of claim to validate points claimed :**	**Number of points claimed (80/20 system) (To be completed by the bidder)**	**Percentage (%) ownership per specific goals**
Black People	5	DBE will utilise CSD Report to validate points claimed		
Women	8	DBE will utilise CSD Report to validate points claimed		
Disability	1	**Submit any of the documents below**: • Proof of registration with National Council for Persons with Physical Disability in South Africa registration (NCPPDSA); **OR** • Medical Certificate		
Youth	6	DBE will utilise CSD Report to validate points claimed		
Total Points	**20**			

8. PAYMENT

8.1. Payment shall be affected proportionately on completion of each phase as will be outlined in the service level agreement (SLA) of the project and within 30 days of receipt of valid original invoices.

8.2. The payment for the service rendered will be processed when DBE is satisfied with the compliance from the service provider, in line with their performance on the scope of work, upon completion of each phase.

9. MONITORING AND REPORTING

9.1. The DBE will monitor the performance of the service provider in terms of the stipulated deliverables and timeframes. A Project Steering Committee, appointed by the Director-General will regularly meet to monitor deliverables. These meetings will be added to regular project meetings that will focus on the operational aspects of the project. Formal meeting procedures will be followed and approved and signed minutes will be kept by the DBE as official meeting records.

9.2. The DBE reserves the right to terminate the contract with the service provider at any point during the contract period should the performance of the service provider not meet the satisfactory requirements of the stipulated deliverables.

10. CONDITIONS

10.1. Material compiled for and by the Department of Basic Education (DBE may not be used in any form or for any purpose other than the purpose stipulated in this agreement. If the service provider wishes to use such material in any other form or for any other purpose, including, but not limited to, workshops, media releases and the like, it must submit to the DBE a written motivation for such use.

10.2. The DBE will request approval from the designated officer in who copyright vests. Only once the designated officer has granted written approval will the DBE convey such written approval to the service provider and will the service provider have permission for such usage.

10.3. In the case of material compiled, developed, researched, commented on, or evaluated on behalf of the DBE as a result of a contractual agreement with the service provider, or any other form of material, irrespective of whether in a completed form or otherwise, all intellectual property rights relating to such material will vest in the state. The service provider may not use any such material without first having obtained written approval from the DBE.

10.4. The Service Provider will be expected to complete all phases of the project and adhere strictly to the deadlines specified. A written report on completion of each phase is mandatory.

10.5. The Service Provider is expected to demonstrate credibility and perform the services as described in this document.

10.6. If bidding with an intention of subcontracting certain tasks the bidder must state, the name of the subcontract Company and percentage to be sub-contracted. DBE will confine its contractual dealings with the primary service provider in a case where there is a consortium

10.7. The appointed Service Provider shall undertake to avoid any activity of whatsoever nature that may be detrimental to the Department's interest, goodwill and reputation.

10.8. The DBE reserves the right to change the Terms of Reference prior to the closing of the bid.

10.9. The Department reserves the right not to award the tender and will not be held liable for the preparation of the bid documents by the bidders.

12.9 TERMINATION FOR DEFAULT: The Department, without prejudice to any other remedy for breach of contract, by written notice of default sent to the supplier reserves the right to terminate this contract with the appointed service provider, in accordance with clause 23 of the General Conditions of Contract, should challenges be experienced with the service delivery and customer service to the Department.

12.10 The Bidder/s must submit proof of registration with the National Treasury's Central Supplier Database (CSD).

12.11 Consortiums, who possess all the functional knowledge and experience, will be considered for this proposal but proposals must clearly indicate the organization that will

be the lead agency that will take full managerial and technical accountability for the outcomes of this proposal.

11. Enquiries

Enquiries for this RFQ should be made in writing and should be forwarded to dberfq@dbe.gov.za.

basic education
Department:
Basic Education
REPUBLIC OF SOUTH AFRICA

REQUEST FOR QUOTATION ON THE FOLLOWING SUPPLY OF GOODS , SERVICES AND OR WORKS

QUOTATION REQEST No:	RFQ26476	**CLOSING DATE:**	11.11.2026 @ 15:00
QUOTATION REQESTED BY	MS NATASHA MPOSWA	**INVITATION DATE:**	06.11.2026
TELEPHONE NUMBER	012 357 3861	**CENTRAL EMAIL**	dberfq@dbe.gov.za

QUOTATION DESCRIPTION : PROCUREMENT OF LICENSES

SPECIFICATIONS: (SEE ATTACHED)

COMMODITY	QUANTITY
3X TABLEAU CREATOR LICENSE SUBSCRIPTION	3
TABLEAU EXPLORER LICENSE SUBCRIPTION (LICENSE MUST INCLUDE TABLEAU PREP)	10
SUPPORT AND MAINTENANCE AS PER SPECIFICATION PERIOD FROM 01 DECEMBER 2026 TO 30 NOVEMBER 2027	1

DELIVERY POINT: 222 Struben Street, Pretoria, 0001

EXPECTED DATE OF DELIVERY:

Detailed quotation must be on a Company Letterhead and must be attached to this Request (RFQ document) together with completed: SBD1, SBD4 and SBD6.1.		
Quotation validity		Days
Acceptance of this quotation is through receipt of a duly authorised and signed Purchase Order on Form: 82/8062 (Z577) or Z492 (82/7860)		
It is acknowledged that late quotations are not considered.		

Method to be used to calculate points for specific goals

For procurement transactions with a rand value up to R1 Million (Inclusive of all applicable taxes) the specific goals listed below are applicable:

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system)	Documents required as proof of claim to validate points claimed :	Number of points claimed (80/20 system) (To be completed by the tenderer)	Percentage (%) ownership per specific goals
Black People	5	DBE will utilise CSD Report to validate points claimed		
Women	8	DBE will utilise CSD Report to validate points claimed		
Disability	1	**Bidders must submit any of the documents below:** • South African Social Security Agency (SASSA) registration; **OR** • National Council for Persons with Physical Disability in South Africa registration (NCPPDSA); **OR** • Medical Certificate		
Youth	6	DBE will utilise CSD Report to validate points claimed		
Total Points	**20**			

NOTE: DBE will verify the ownership percentage using CSD report, should there be discrepancies CSD report takes precedence.

NAME OF SERVICE PROVIDER				
REPRESENTED BY				
SIGNATURE				
CSD NUMBER	MAAA			
PHSICAL ADDRESS				
TELEPHONE NUMBER	**CODE**		**NUMBER**	
CELL PHONE NUMBER	**CODE**		**NUMBER**	
EMAIL ADDRESS				

PART A
INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE *(NAME OF DEPARTMENT/ PUBLIC ENTITY)*					
BID NUMBER:	RFQ26476	CLOSING DATE:	11/11/2026	CLOSING TIME:	15:00
DESCRIPTION	PROCUREMENT OF LICENSES				

BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT *(STREET ADDRESS)*

SENT VIA EMAIL TO: DBERFQ@dbe.gov.za

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO		**TECHNICAL ENQUIRIES MAY BE DIRECTED TO:**	
CONTACT PERSON	**NATASHA MPOSWA**	CONTACT PERSON	
TELEPHONE NUMBER	**012 357 3861**	TELEPHONE NUMBER	
FACSIMILE NUMBER		FACSIMILE NUMBER	
E-MAIL ADDRESS	**Mposwa.N@dbe.gov.za**	E-MAIL ADDRESS	

SUPPLIER INFORMATION					
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] ☐ Yes ☐ No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	[TICK APPLICABLE BOX] ☐ Yes ☐ No	

[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]

ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	☐Yes ☐No [IF YES ENCLOSE PROOF]	ARE YOU A FOREIGN BASED SUPPLIER FOR **THE GOODS /SERVICES /WORKS OFFERED?**	☐Yes ☐No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]

QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS

IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?	☐ YES ☐ NO
DOES THE ENTITY HAVE A BRANCH IN THE RSA?	☐ YES ☐ NO
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?	☐ YES ☐ NO
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?	☐ YES ☐ NO
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?	☐ YES ☐ NO

IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.

PART B
TERMS AND CONDITIONS FOR BIDDING

1.	**BID SUBMISSION:**
1.1.	BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
1.2.	**ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.**
1.3.	THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
1.4.	**THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).**
2.	**TAX COMPLIANCE REQUIREMENTS**
2.1	BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
2.2	BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
2.3	APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
2.4	BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
2.5	IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
2.6	WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
2.7	NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

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

SIGNATURE OF BIDDER: .....

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

DATE: .....

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest1 in the enterprise, employed by the state? **YES/NO**

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

Full Name	Identity Number	Name of State institution

2.2 Do you, or any person connected with the bidder, have a relationship

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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.

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 consortium2 will not be construed as collusive bidding.

3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.

3.4 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

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

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

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

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1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

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

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

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
Total points for Price and SPECIFIC GOALS	**100**

1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this 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 or 90 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

4. POINTS AWARDED FOR SPECIFIC GOALS

4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:

4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—

(a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or

(b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,

then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

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

Note to tenderers:

1. ***The tenderer must indicate how they claim points for each preference point system.***
2. ***Allocation of points will be prorated as per percentage of ownership of each goal***
3. **DBE will verify the ownership percentage using CSD report, should there be discrepancies CSD report takes precedence.**

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system)	Documents required as proof of claim to validate points claimed :	Number of points claimed (80/20 system) (To be completed by the tenderer)	Percentage (%) ownership per specific goals
Black People	5	DBE will utilise CSD Report to validate points claimed		
Women	8	DBE will utilise CSD Report to validate points claimed		
Disability	1	**Submit any of the documents below**: • South African Social Security Agency (SASSA) registration; **OR** • National Council for Persons with Physical Disability in South Africa registration (NCPPDSA); **OR** • Medical Certificate		
Youth	6	DBE will utilise CSD Report to validate points claimed		
Total Points	**20**			

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.

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SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME: .....

DATE: .....

ADDRESS: .....

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