



state security

State Security Agency
REPUBLIC OF SOUTH AFRICA

**PART A
INVITATION TO BID**

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (STATE SECURITY AGENCY)

BID NUMBER:	SSA/03/2024-25	CLOSING DATE:	05 June 2024	CLOSING TIME:	11:00
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COMPULSORY BRIEFING SESSION	15 May 2024 @11:00am (SSA HEADQUARTERS: Musanda)
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DESCRIPTION:	OPTIMUM MEDICAL SCHEME (OPMED) SEEKS THE SERVICES OF EXPERIENCED AND ACCREDITED MANAGED HEALTHCARE PROVIDER(S) TO MANAGE AN HYPERTENSION PROGRAMME FOR A FIVE (5) YEAR PERIOD
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BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)

SSA HEADQUARTERS RECEPTION
MUSANDA COMPLEX
1 JOE NHLANHLA STREET
PRETORIA
0181

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO:

CONTACT PERSON	Ms. Nobantu Mogotsi
TELEPHONE NUMBER	+27 (12) 427 4174
E-MAIL ADDRESS	nobantum@ssa.gov.za

SUPPLIER INFORMATION

NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
CONTRACT PERSON					
E-MAIL ADDRESS					

VAT REGISTRATION NUMBER					
TOTAL BID PRICE Inc. VAT					
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
[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?	<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 THE QUESTIONNAIRE BELOW
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS					
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					
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:

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DEFINITIONS

The rules of interpretation and defined terms contained in the General Conditions of Contract (GCC) shall apply to this invitation to bid unless the context requires otherwise.

In addition the following terms used in this invitation to bid shall, unless indicated otherwise, have the meanings assigned to such terms in the table below.

SSA	State Security Agency.
Invitation to bid	Invitation to bid comprising: <ul style="list-style-type: none">○ The cover page and the table of content and definitions○ Part 1 which details the Conditions of Bid○ Part 2 which details the Terms of Reference relating to the service○ Part 3 which contains all the requisite bid forms and certificates; As read with GCC – General Conditions of Contract
Services	Defined services on the cover page of this invitation to bid and described in detail in the Terms of Reference;
Specifications /Terms of Reference	Specifications or terms contained in Part 2 of this invitation to bid;

Part 1

Conditions of Bid

1. BACKGROUND AND INTRODUCTORY PROVISIONS

Refer to Part 2 of this invitation to bid for background and introductory information relating to the Services and this invitation to bid.

2. OFFER AND SPECIAL CONDITIONS

2.1 Without detracting from the generality of clause below, bidders must submit a completed and signed and requisite bid forms attached as Part 3 with its bid. Bidders must take careful note of the conditions of award.

2.2 **All bids submitted in reply to this invitation to bid should incorporate all the forms, parts, certificates and other documentation forming part of this invitation to bid, duly completed where required.**

2.3 **It is a requirement that Tax matters of a service provider must be complaint with SARS when submitting, during and at the award of this tender.**

2.4 In the event that any form or certificate provided in Part 3 of this invitation to bid does not have adequate space for the bidder to provide the requested details, the bidder should attach an annexure to such form or certificate on which the requested details should be provided and the bidder should refer to such annexure in the form or certificate provided.

3. CLOSING TIME OF BIDS AND PROVISIONS RELATING TO SUBMISSION OF BIDS

3.1 The closing date and time for the receipt of bids in response to this invitation to bid is detailed on the cover page of this invitation to bid.

3.2 All bids must be submitted in a sealed envelope bearing the bid number, bid description and closing date.

3.3 All bids must be deposited before the closing time and date stipulated above in the bid box at the address detailed on the cover page of this invitation to bid.

4. ENQUIRIES

Should any bidder have any enquiries relating to this invitation to bid, such enquiries may only be addressed to the person/s detailed on the cover page to this invitation to bid at the number/s stipulated. Bidders are given until two (2) days before the closing date to forward enquiries regarding the tender.

5. COMPULSORY BID BRIEFING/SESSION

There is compulsory briefing session for this tender

6. TAX CLEARANCE

The bidder should have compliant tax matters with SARS when submitting bid documentation. A pro forma application for Tax Clearance Certificate (SBD 2) is attached as Part 3 – Schedule B. Bidder must take specific note of the conditions stipulated in SBD 2. Tax clearance certificate and B-BBEE certificate must be renewed every 12 months and must be submitted to Supply Chain Management.

7. PRICING

7.1 The bidder(s) must submit details regarding the bid price for the Services on the Pricing Schedule form/s attached as Part 3 – Schedule C which completed form/s must be submitted together with the bid documents.

7.2 Pricing stipulated must be **INCLUSIVE OF VALUE ADDED TAX**.

7.3 It is an express requirement of this invitation to bid that the bidders provide some transparency in respect to their pricing approach. In this regard, bidders must indicate the basis on which they have calculated their pricing by completing all aspects of the Pricing Schedule form Part 3 – Schedule C.

7.4 The total price including VAT should be transferred to SBD1.

8. DECLARATION OF INTEREST

The bidder should submit a duly signed declaration of interest (SBD 4) together with the bid. The declaration of interest is attached as Part 3 – Schedule D.

9. QUALIFICATIONS OF BIDDERS

Bidders must submit detailed information together with their bid and disclose the experience in the relevant trade together with present contracts. These details should be submitted together with the bid on the form attached as Part 3 – Schedule E.

10. PARTNERSHIPS AND LEGAL ENTITIES

In the case of the bidder being a partnership, close corporation or a company all certificates reflecting the names, identity numbers and address of the partners, members or directors (as the case may be) must be submitted with the bid. These details should be submitted on the form attached as Part 3 – Schedule G.

11. CONSORTIUM / JOINT VENTURE

11.1 It is recognized that bidders may wish to form consortia to provide the Services.

11.2 A bid in response to this invitation to bid by a consortium shall comply with the following Requirements:-

11.2.1 It shall be signed so as to be legally binding on all consortium members;

- 11.2.2 One of the members shall be nominated by the others as authorized to be the lead member and this authorization shall be included in the agreement entered into between the consortium members;
- 11.2.3 The lead member shall be the only authorized party to make legal statements, communicate with the SSA and receive instructions for and on behalf of any and all the members of the consortium;
- 11.2.4 A copy of the agreement entered into by the consortium members shall be submitted with the bid;
- 11.2.5 Each party to the Consortium must submit a BBEE Status Level Verification certificate;
- 11.2.6 Each party to the Consortium must be tax compliant with SARS;
- 11.2.7 Preference points will only be awarded when a consolidated BBEE Certificate is submitted; and
- 11.2.8 Parties should be registered on the Central Supplier Database or be willing to register on such a database.

12. ORGANISATIONAL PRINCIPLES

The bidder should submit a clear indication of the envisaged authorized organizational principles, procedures and functions for an effective delivery of the required Service. These details should be submitted on the form attached as Part 3 – Schedule H.

13. DETAILS OF THE PROSPECTIVE BIDDERS NEAREST OFFICE TO THE LOCATION OF THE CONTRACT

The bidder should provide full details regarding the bidders nearest office base in the province (see Part 3 of this invitation to bid). These details should be provided on the form attached as Part 3 – Schedule I, which completed form must be submitted together with the bid.

14. FINANCIAL PARTICULARS

Bidder must provide full details regarding its financial particulars and standing, which particulars should be submitted together with the bid on the form attached as Part 3 – Schedule J

15. PREFERENCE POINTS CLAIM FORMS

Part 3- Schedule K contains the Preference Points Claim Forms in terms of Preferential Procurement Regulations, 2017 to be completed and signed by the bidder to the extent applicable and returned with this bid.

16. VALIDITY

Bid documentation submitted by the bidder will be valid and open for acceptance for a period of **(150) one hundred and fifty** calendar days from the closing date and time stipulated on the front cover of this invitation to bid.

17. ACCEPTANCE OF BIDS

17.1 The SSA does not bind itself to accept either the lowest or any other bid and reserves the right to accept the bid which it deems to be in the best interest of the Department.

17.2 The SSA reserves the right to award the bid in wholly or in part thereof.

18. NO RIGHTS OR CLAIMS

18.1 Receipt of the invitation to bid does not confer any right on any party in respect of the Services or in respect of or against the SSA. The SSA reserves the right, in its sole discretion, to withdraw by notice to bidders any Services or combination of Services from the bid process, to terminate any party's participation in the bid process or to accept or reject any response to this invitation to bid on notice to the bidders without liability to any party. Accordingly, parties have no rights, expressed or implied, with respect to any of the Services as a result of their participation in the bid process.

18.2 The SSA, nor any of their respective directors, officers, employees, agents, representatives or advisors will assume any obligations for any costs or expenses incurred by any party in or associated with any appraisal and/or investigation relating to this invitation to bid or the subsequent submission of a bid in response to this invitation to bid in respect of the Services or any other costs, expenses or liabilities of whatsoever nature and howsoever incurred by bidders in connection with or arising out of the bid process.

19. NON DISCLOSURE, CONFIDENTIALITY AND SECURITY

19.1 The invitation to bid and its contents are made available on condition that they are used in connection with the bid process set out in the invitation to bid and for no other purpose. All information pertaining to this invitation to bid and its contents shall be regarded as restricted and divulged on a "need to know" basis with the approval of the SSA.

19.2 In the event that the bidder is appointed pursuant to this invitation to bid such bidder may be subject to security clearance prior to commencement of the Services.

20. ACCURACY OF INFORMATION

20.1 The information contained in the invitation to bid has been prepared in good faith. The SSA nor any of their respective directors, advisors, officers, employees, agents, representatives make any representation or warranty or give any undertaking express or implied, or accept any responsibility or liability whatsoever, as to the contents, accuracy or completeness of the information contained in the invitation to bid, or any other written or oral information made available in connection with the bid and nothing contained herein is, or shall be relied upon as a promise or representation, whether as to the past or the future.

20.2 This invitation to bid may not contain all the information that may be required to evaluate a possible submission of a response to this invitation to bid. The bidder should conduct its own independent analysis of the operations to the extent required to enable it to respond to this bid.

21. COMPETITION

- 21.1 Bidders and their respective officers, employees and agents are prohibited from engaging in any collusive action with respect to the bidding process which serves to limit competition amongst bidders.
- 21.2 In general, the attention of bidders is drawn to Section 4(1) (iii) of the Competition Act 1998 (Act No. 89 of 1998) (the Competition Act) that prohibits collusive bidding.
- 21.3 If bidders have reason to believe that competition issues may arise from any submission of a response to this bid invitation they are encouraged to discuss their position with the competition authorities before submitting response.
- 21.4 Any correspondence or process of any kind between bidders and the competition authorities must be documented in the responses to this invitation to bid.
- 21.5 Part 4 (Schedule F) should be completed and duly signed.

22. RESERVATION OF RIGHTS

- 22.1 Without limitation to any other rights of the SSA (whether otherwise reserved in this invitation to bid or under law), the SSA expressly reserves the right to:-
 - 22.1.1 Request clarification on any aspect of a response to this invitation to bid received from the bidder, such requests and the responses to be in writing;
 - 22.1.2 Amend the bidding process, including the timetables, closing date and any other date at its sole discretion; and
- 22.2 Reject all responses submitted by bidders and to embark on a new bid process.

23. SECURITY REQUIREMENTS

- 23.1 **Security clearances:** The bidder's (principal or joint venture contractor) employees and sub Bidders **are** required at all times during the contract period to be in possession of valid security clearances to the level determined by SSA commensurate with the nature of the project activities they are involved in. The cost of obtaining suitable clearances is for the account of the bidders.
- 23.2 The vendors shall supply and maintain a list of personnel involved on the account indicating their clearance status. Negative or failure of security clearance or vetting by the bidder bidder's employees or partners at any stage during the contracting or contract period and lack of or inability to obtain acceptable replacements by the contractor may lead to the cancellation of the contract. The Bidders and their sub-Bidders will be re-vetted for every event during the period of contracting.

PART 2

SPECIFICATIONS

OPTIMUM MEDICAL SCHEME (OPMED) SEEKS THE SERVICES OF EXPERIENCED AND ACCREDITED MANAGED HEALTHCARE PROVIDER(S) TO MANAGE AN HYPERTENSION PROGRAMME FOR A FIVE (5) YEAR PERIOD

1. Introduction

The Optimum Medical Scheme (OPMED) is a self-administered in-house Medical Scheme for the members of the State Security Agency (SSA). It is managed as a service benefit and Government subsidized. The Scheme has to adhere to Government policies and based on the total tender amount for the period of the contract, an open tender process has to be followed to appoint accredited and experienced Managed Healthcare service provider(s) responsible to manage an Hypertension Programme.

2. Background

- 2.1 OPMED is guided by the requirements of the Medical Schemes Act (MSA), No 131 of 1998 despite exemption from the application of the Act.
- 2.2 The Scheme is responsible for the administration of all functions within the medical schemes environment and runs on the MIP Healthcare System. The OPMED Management Control Board (OMCB) is an internal representative governance body responsible for corporate governance.
- 2.3 OPMED is central to all structures of the SSA and provides a unique service to all clients (including service provider(s)). Because of stringent security policies, the Scheme cannot have a direct link from the MIP Healthcare System with the external world no data is allowed to be removed from the premises and final testing needs to be done on site. The Scheme makes use of batch processing and File Transfer Processing (FTP) sites only.

3. Objective

- 3.1 The purpose of this invitation is to afford the opportunity to experienced and accredited Managed Care service provider(s) responsible for a Hypertension programme who can deliver a comprehensive solution to OPMED.

4. Scope of work

- 4.1 The bidder is required to provide a comprehensive solution. This section is dedicated to better understand the service provider(s) proposed solution on how you provide service to your customers and the methodologies implemented to ensure the agreed service level parameters are met.
- 4.2 Bidders are required to provide a plan (including architecture design, etc) on how the supply and services will be provided or undertaken.
- 4.3 This purpose of the ToR is for the appointment of one solution Managed Care service provider(s) responsible for the Hypertension Programme.
- 4.4 During selection of a Managed Care service provider(s) in response to this ToR, **only respondents who can provide a total solution will be considered.**
- 4.5 It is the intent of this ToR to acquire a Managed Care service provider(s) is capable of supplying an Hypertension Programme for 7 Days a week with a 24-hour emergency access telephone number (hotline) and interrupted operation.

4.6 The section below indicates the MINIMUM contractual requirements and the respondent(s) must include ALL required contractual and costing information to ensure a complete solution.

5. MANDATORY REQUIREMENTS

Failure to comply with all mandatory requirements will be invalidate the bid

Requirement	Comply	Do not Comply	Detail of offer/proposal or proof can be provided on a separate sheet
Legislative adherence: - Accredited service provider(s) and level of accreditation (Counsel For Medical Schemes) (Proof to be provided)			
Years of experience (minimum of 5 years)			
Clients (include total number of lives managed) - Number of medical schemes as clients - Number of Healthcare Administrators as clients - Average total of transactions per day - Average total of transactions per month			
Compulsory services to ensure and promote compliance: Analysis of medical data outcomes - Hypertension (health advice or health education), clinical mentoring, specialized professional advice and support to patient - Six (6) monthly practitioner consultation visits for Hypertension management review - Six (6) monthly: Disease monitoring scheduled as per the clinical guidelines. - review of all applications/new prescriptions - Provision of specialist advice to the treating practitioner <ul style="list-style-type: none"> o Data integrity validation (list standards applied per line transaction) o Eligibility management: - Membership number as per membership card - Membership number requirements - Dependent code as per membership card - Dependent date of birth			

<ul style="list-style-type: none"> - Dependent's gender (male/female) - Valid practice number of the prescriber - Electronic interface required with service provider responsible for hospital admissions, the MIP system and service provider responsible for medicine management - Service standards and skills <ul style="list-style-type: none"> - Turnaround time of new registration process - % of adherence level of your Programme - Type of counselling offering - Method of communication to patient/medical practitioner - <ul style="list-style-type: none"> - Established a separate Call Centre/Helpdesk by clinical personnel who have the expertise - 086 number - Office hours - A 24-hour emergency access telephone number ('Hotline') - Separate email address - Call Centre/Helpdesk working hours - Number of allocated clinical personnel to counsel, support and guide patients - Training (explain method and frequency) <p>Clinical risk management</p> <ul style="list-style-type: none"> - Case management - Clinical audit - Advisory service - Benefit management - Courier service and dispensing fee per medicine item (monthly delivering of Hypertension medication) - Reporting (List, frequency and example(s)) 			
Disaster recovery plan			

6. List of additional services

Requirement	Comply	Do not Comply	Detail of offer/proposal
Negotiations with pathology service providers			
Negotiations with pathology service providers with specific Hypertension related tests. Other services Provide comprehensive statistics/report to SSA (Employee Wellness) on a monthly and quarterly basis (DPSA requirement).			

7. Processes

Requirement	Comply	Do not Comply	Detail of offer/proposal
<ul style="list-style-type: none"> Standard operating procedures with turn-around times Treatment guideline. 			
Include project plan / work schedule to go live with Programme			

8. BID EVALUATION PROCESS

Item	Phases	Category	Maximum points
1	Phase 1	Administrative compliance	
2	Phase 2	Technical / Functional Proposal	100
3	Phase 3	Price BBBEE	80 20

8.1 Phase 1: Administrative compliance

To be considered responsive, bids must satisfy responsive criteria as set in the SBD forms attached failure which may result in the proposals being disqualified.

Item No	Document that must be submitted	YES √	NO x	Comments
1	Invitation to Bid – SBD 1			
2	Schedule A – General Conditions of Contract			
3	Schedule B - Original and valid Tax Clearance Certificate as stipulated (SBD 2)			When is it expiring:
4	Schedule C - Pricing Schedules (SBD3.2 and SBD 3.3)			
5	Declaration of interest – SDB 4 also submit mandatory documents			
6	Schedule E: In case of a Joint Venture, an agreement must be signed by both parties to the JV.			

Item No	Document that must be submitted	YES √	NO x	Comments
7	Schedule F -Schedule - Qualifications and Experience			
8	Schedule G - Organizational Type and Structure			
9	Schedule H - Details of Bidder's nearest office (Schedule H)			
10	Schedule I – Financial Particulars latest audited financial statements			
11	Schedule J – Preferential Claim form (SBD 6.1) B-BBEE Certificate			
12	Schedule K – Security Clearance Requirements (SBD0)			
13	Registration on Central Supplier Database (CSD). In case of a/joint Venture arrangement, all Bidder(s) members must also submit all the mandatory documents			CSD Registration No; MAAA_____
14	On CSD: In case of Joint Venture arrangement, all Bidder(s)/members must also submit tax compliance status			
18	Pricing Schedule			

8.2 Phase 2: Technical /Functionality

- The Technical Proposals received will be evaluated the Functional / Technical threshold Score will be **100** points and only those bids that subsequently achieve the technical threshold score of **65** points or more will be short listed.
- The Functional/Technical information must be consolidated into a report format.
- The technical proposals will consist of the following area:-

Functionality		
Evaluation area	Evaluation criteria	Total Scores
Overall integrated Project solution, Project management and technical competency	<ul style="list-style-type: none"> Accreditation Professional structure / team to complete the project Registration with professional bodies Relevant experience in project of similar nature Completed projects of similar nature 	50
Technical skills and Capabilities	<ul style="list-style-type: none"> Resources and Equipment's Personnel and Equipment Allocation and Deployment 	40
Project Plans	<ul style="list-style-type: none"> Detailed project / Executive Plan and Management plan 	10

- 8.3** The following score sheet and criteria shall apply for scoring by the evaluation committee members in scoring compliant/qualifying bids meeting the minimum technical / functional requirements.

Phase 2: Technical /Functionality			
	Description	Scoring	Item Weight
Overall Integrated Project Solution, Project Management And Technical Competency			
1.1	Accreditation with the Counsel For Medical Schemes (CMS)	5	
	<i>No Accreditation provide</i>		0
	<i>Accreditation provided</i>		5
1.2	Professional Structure / team to implement the programmes	20	
	<ul style="list-style-type: none"> Relevant Professional qualifications - Skills and personnel available for Hypertension programme Relevant qualifications of personnel must be applicable to the relevant field of expertise required to render the services set of in the terms of reference. 		
	<i>No submission</i>		0
	<i>Matric with relevant experience</i>		5
	<i>Tertiary Diploma with relevant experience</i>		7
	<i>Tertiary Degree with relevant experience</i>		10
	<i>Tertiary Honours with relevant experience</i>		15
<i>Tertiary Honours and Masters with relevant experience</i>	20		
1.3	Registration of the relevant professionals (listed on 1.2) with the relevant professional bodies (e.g. HPCSA, SAPC,SANC)	10	
	No Submission		0
	Proof of registration		10
1.4	Track Record & Relevant clinical experience	15	
	<ul style="list-style-type: none"> Number of years active in chronic disease management, experience gained in this field, to whom services were provided, and record of services rendered, indicating types, variety, and quantity, complete with references. The prospective bidder(s) must indicate what the magnitude of services were, where it was rendered and what challenges were effectively dealt with, in particular when time constraints were to be adhered to. Minimum requirements to obtain score at “acceptable level” will be confirmation of at least five (5) years of applicable clinical experience in related programmes. 		
	<i>1 – 4 years’ experience</i>		5
	<i>5 - 7 years’ experience</i>		10
	<i>More than 7 years</i>		15
2.1	Completed projects of similar nature	20	

Phase 2: Technical /Functionality			
	Description	Scoring	Item Weight
	<ul style="list-style-type: none"> Relevant skills & Specialist disease management programmes implemented for clients - Level of skills regarding specialist designs, development and implementation completed with respect to the respective programmes knowledge and understanding of specific requirements in managing a comprehensive service The prospective bidder(s) must also clearly illustrate a strategy followed when dealing with special needs of SSA and implementation to obtain optimum solutions during contract period 		
	<i>No Programmes implemented</i>		0
	<i>1 Programme implemented</i>		3
	<i>2 Programmes implemented</i>		5
	<i>3 Programmes implemented</i>		10
	<i>4 Programmes implemented</i>		15
	<i>>5 Programmes implemented</i>		20
Skills, capabilities and operations			
	Resources and Equipment		
	Capacity knowledge and relevant experience and skills of personnel available for Hypertension Programmes. The prospective bidder(s) must indicate what resources are and will be available to render the services as described in the tender and how additional resources will be acquired when needed		
	<i>Call Centre/ Helpdesk /email only</i>		3
	<i>Call Centre/ Helpdesk / Emergency telephone / hotline/email</i>		5
2.2	<i>Call Centre/ Helpdesk Emergency telephone / hotline and courier services for chronic medication/email</i>	20	7
	<i>Call Centre/ Helpdesk Emergency telephone / hotline and courier services for chronic medication/email / Turn-around time for new registrations</i>		10
	<i>Call Centre/ Helpdesk Emergency telephone / hotline and courier services for chronic medication/email /Turn-around time for new registrations / % of adherence level of Programme</i>		15
	<i>Call Centre/ Helpdesk Emergency telephone / hotline and courier services for chronic medication/email /Turn-around time for new registrations /Type of counseling offering /Method of communication</i>		20
3.	Project Plan		
	Detailed project / Executive Plan and Management plan		
	The prospective bidder(s) must indicate what and when resources will be deployed (or reserved) to meet the expectations of the client and will be available to render the services as described in the tender. Minimum requirements to obtain score at "acceptable level" will be indication and illustration of proper project plan to illustrate what support personnel (in the respective disciplines) will be available to perform the work required, what the activities of the personnel will entail and what plant and equipment must be available for optimal delivery.		
	<i>No Contingency Plan</i>		0

Phase 2: Technical /Functionality			
	Description	Scoring	Item Weight
	<i>Contingency Plan with Works programme that demonstrates understanding of the requirement up to 50% - operational plan and is most likely to result in quality work</i>	10	5
	<i>Contingency Plan with Works programme that demonstrates understanding of the requirement up to 100% - operational plan and is most likely to result in quality work</i>		10

9. Stage 3: Price and B-BBEE stage evaluation in terms of the 80/20 or 90/10 preference point systems

The bid will be evaluated in terms of the 80/20 point system as stipulated in the Preferential Procurement Regulations, 2023. 80 points will be allocated for price and 20 points for attaining the B-BBEE status level of contributor.

6.3.1 Evaluation in terms of Points for Price points

The following formulae will be used in calculating points scored for price as follows:

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

Where

- P_s = Points scored for comparative price of tender or offer under Consideration
- P_t = Comparative price of tender or offer under consideration; and
- P_{\min} = Comparative price of lowest acceptable tender or off

NB: Bidders are required to, together with their bids submit original and valid B-BBEE status level verification certificates/affidavits or certified copies to substantiate their B-BBEE rating claim. A bidder will not be disqualified from the bidding process if the bidder does not submit a certificate substantiating the B-BBEE status level of contribution nor is a non-compliant contributor. Such a bidder will score 0 out of maximum of 20 points for B-BBEE. Total points scored will be calculated by adding points scored for price and B-BBEE Contributor Level.

6.3.2 Evaluation in terms of BBEE points

Bidders are required to, together with their bids submit original and valid B-BBEE status level verification certificates or certified copies to substantiate their B-BBEE rating claims. A bid will not be disqualified from the bidding process if the bidder does not submit a certificate substantiating the B-BBEE status level of contribution nor is a non-compliant contributor. Such a bidder will score 0 out of maximum of 20 points for B-BBEE.

Point allocation will be done as per the below table:-

B-BBEE Status Level of Contributor	Number of Points (80/20)
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

***NB: Total Points scored for Price and BBEE must be rounded off to the nearest 2 decimal places.**

10. PERIOD FOR THIS PROJECT

A service level agreement (SLA) should be signed between the SSA and the service provider for a period of five (5) years.

Part 3- Schedule A

General Conditions of Contract and Special Conditions of Contracts

NOTES

The purpose of this document is to:

- (i) Draw special attention to certain general conditions applicable to government bids, contracts and orders; and
- (ii) To ensure that clients be familiar with regard to the rights and obligations of all parties involved in doing business with government.

In this document words in the singular also mean in the plural and vice versa and words in the masculine also mean in the feminine and neuter.

- The General Conditions of Contract will form part of all bid documents and may not be amended.
- Special Conditions of Contract (SCC) relevant to a specific bid, should be compiled separately for every bid (if applicable) and will supplement the General Conditions of Contract. Whenever there is a conflict, the provisions in the SCC shall prevail.

NB: SEE ATTACHED GENERAL CONDITIONS OF CONTRACT

Part 3 – Schedule B

Application for Tax Clearance Certificate

TAX CLEARANCE REQUIREMENTS IT IS A CONDITION OF BIDDING:-

1. It is an absolute requirement that the taxes of the successful bidder **must** be in order or that satisfactory arrangements have been made with the Receiver of Revenue to meet his / her obligations.
2. The attached form, Application for Tax Clearance Certificate (in respect of bids), must be completed by the bidder in all respects and submitted to the Receiver of Revenue where the bidder is registered for tax purposes. That Receiver of Revenue will then furnish the bidder with a Tax Clearance Certificate that will be valid for 6 months from date of issue. This Tax Clearance Certificate must be submitted in the original together with the bid. Failure to submit an **original** and valid Tax Clearance Certificate at the time of submission of the bid **shall** invalidate the bid.
3. In bids where Consortia/ Joint Ventures /Sub-Contractors are involved each party must submit a separate Tax Clearance Certificate. Copies of the Application for Tax Clearance Certificate are available at any Receiver's Office.

APPLICATION FOR TAX CLEARANCE CERTIFICATE (IN RESPECT OF OFFERORS)

1. Name of taxpayer / bidder: _____

2. Trade name: _____

3. Identification number:

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

1. Company / Close Corporation registration number:

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

2. Income tax reference number:

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

3. VAT registration number (if applicable):

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

4. PAYE Employer's registration number

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

(If applicable)

Signature of contact person requiring Tax Clearance Certificate:

Name: _____

Telephone Number: Code: _____ Number: _____

Address: _____

DATE: _____ / _____ / _____

PLEASE NOTE THAT THE COMMISSIONER OF THE SOUTH AFRICAN REVENUE SERVICE (SARS) WILL NOT EXERCISE HIS DISCRETIONARY POWERS IN FAVOUR OF ANY PERSON WITH REGARD TO ANY INTEREST, PENALTIES AND/OR ADDITIONAL TAX LEVIABLE DUE TO THE LATE OR UNDER PAYMENT OF TAXES, DUTIES OR LEVIES OR THE RENDITION OF RETURNS BY ANY PERSON AS A RESULT OF ANY SYSTEM NOT BEING YEAR 2000 COMPLIANT.

PRICE ADJUSTMENTS

A NON-FIRM PRICES SUBJECT TO ESCALATION

1. IN CASES OF PERIOD CONTRACTS, NON FIRM PRICES WILL BE ADJUSTED (LOADED) WITH THE ASSESSED CONTRACT PRICE ADJUSTMENTS IMPLICIT IN NON FIRM PRICES WHEN CALCULATING THE COMPARATIVE PRICES

2. IN THIS CATEGORY PRICE ESCALATIONS WILL ONLY BE CONSIDERED IN TERMS OF THE FOLLOWING FORMULA:

$$Pa = (1 - V)Pt \left(D1 \frac{R1t}{R1o} + D2 \frac{R2t}{R2o} + D3 \frac{R3t}{R3o} + D4 \frac{R4t}{R4o} \right) + VPt$$

Where:

- Pa = The new escalated price to be calculated.
- (1-V)Pt = 85% of the original bid price. **Note that Pt must always be the original bid price and not an escalated price.**
- D1, D2.. = Each factor of the bid price eg. labour, transport, clothing, footwear, etc. The total of the various factors D1, D2...etc. must add up to 100%.
- R1t, R2 = Index figure obtained from new index (depends on the number of factors used).
- R1o, R2o = Index figure at time of bidding.
- VPt = 15% of the original bid price. This portion of the bid price remains firm i.e. it is not subject to any price escalations.

3. The following index/indices must be used to calculate your bid price:

Index..... Dated..... Index..... Dated..... Index..... Dated.....

Index..... Dated..... Index..... Dated..... Index..... Dated.....

4. FURNISH A BREAKDOWN OF YOUR PRICE IN TERMS OF ABOVE-MENTIONED FORMULA. THE TOTAL OF THE VARIOUS FACTORS MUST ADD UP TO 100%.

FACTOR (D1, D2 etc. eg. Labour, transport etc.)	PERCENTAGE OF BID PRICE

B PRICES SUBJECT TO RATE OF EXCHANGE VARIATIONS

- 1. Please furnish full particulars of your financial institution, state the currencies used in the conversion of the prices of the items to South African currency, which portion of the price is subject to rate of exchange variations and the amounts remitted abroad.**

PARTICULARS OF FINANCIAL INSTITUTION	ITEM NO	PRICE	CURRENCY	RATE	PORTION OF PRICE SUBJECT TO ROE	AMOUNT IN FOREIGN CURRENCY REMITTED ABROAD
				ZAR=		
				ZAR=		
				ZAR=		
				ZAR=		
				ZAR=		
				ZAR=		

- 2. Adjustments for rate of exchange variations during the contract period will be calculated by using the average monthly exchange rates as issued by your commercial bank for the periods indicated hereunder: (Proof from bank required)**

AVERAGE MONTHLY EXCHANGE RATES FOR THE PERIOD:	DATE DOCUMENTATION MUST BE SUBMITTED TO THIS OFFICE	DATE FROM WHICH NEW CALCULATED PRICES WILL BECOME EFFECTIVE	DATE UNTIL WHICH NEW CALCULATED PRICE WILL BE EFFECTIVE

Part 3- Schedule C

PRICING SCHEDULE 3.3

(Professional Services)

NAME	OF	BIDDER:		BID	NO.:
CLOSING TIME 11:00			CLOSING DATE.....		

OFFER TO BE VALID FORDAYS FROM THE CLOSING DATE OF BID.

ITEM NO	DESCRIPTION	BID PRICE IN RSA CURRENCY **(ALL APPLICABLE TAXES INCLUDED)
---------	-------------	--

1. The accompanying information must be used for the formulation of proposals

2. Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project. R.....

3. PERSONS WHO WILL BE INVOLVED IN THE PROJECT AND RATES APPLICABLE (CERTIFIED INVOICES MUST BE RENDERED IN TERMS HEREOF)

4. PERSON AND POSITION HOURLY RATE

	R.....
	R.....
	R.....
	R.....

5. PHASES ACCORDING TO WHICH THE PROJECT WILL BE COMPLETED, COST PER PHASE AND MAN-DAYS TO BE SPENT

	R.....
	R.....

.....
R.....

*** "all applicable taxes" includes value- added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies**

- 6. Are the rates quoted firm for the full period of contract? *YES/NO

- 7. If not firm for the full period, provide details of the basis on which adjustments will be applied for, for example consumer price index.

Any enquiries regarding bidding procedures may be directed to the –
(INSERT NAME AND ADDRESS OF DEPARTMENT/ENTITY)
Tel:
Or for technical information –
(INSERT NAME OF CONTACT PERSON)
Tel:

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.

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

2. BIDDER'S DECLARATION

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

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

Full Name	Identity Number	Name of State institution

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

2.2.1 If so, furnish particulars:

.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise

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.

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

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.

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: Broad-Based Black Economic Empowerment (B-BBEE) Status Level of Contribution.

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: B-BBEE Status Level of Contributor.

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: B-BBEE STATUS LEVEL OF CONTRIBUTOR	20
Total points for Price and SPECIFIC GOALS	100

1.5 In terms of the ACT (PPPFA), the specific goals may include— (i) contracting with persons, or categories of persons, historically disadvantaged by unfair discrimination on the basis of race, gender or disability; (ii) implementing the programmes of the Reconstruction and Development

Programme as published in Government Gazette No. 16085 dated 23 November 1994; any specific goal for which a point maybe awarded, must be clearly specified in the invitation to submit a tender;

- 1.6 To further the above, the State Security Agency has determined its Specific Goals to be those advanced by the Broad Based Black Economic Empowerment Act and its codes of good practice which are not contrary to the spirit and requirements of paragraph 1.5 above.
- 1.7 Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.
- 1.8 The purchaser reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the purchaser.
- 1.9 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.
- 1.10 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).
- (f) **“B-BBEE”** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- (g) **“B-BBEE status level of contributor”** means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- (h) **“bid”** means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of goods or services, through price quotations, advertised competitive bidding processes or proposals;
- (i) **“Broad-Based Black Economic Empowerment Act”** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- (j) **“EME”** means an Exempted Micro Enterprise in terms of a code of good practice on black

economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;

(k) “proof of B-BBEE status level of contributor” means:

- 1) B-BBEE Status level certificate issued by an authorized body or person;
 - 2) A sworn affidavit as prescribed by the B-BBEE Codes of Good Practice;
 - 3) Any other requirement prescribed in terms of the B-BBEE Act;
- (a) “QSE” means a qualifying small business enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;

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

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 (BBBEE status level) 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 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: 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.)

4. POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR

- 4.1 In terms of Regulation 6 (2) and 7 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

The specific goals allocated points in terms of this tender B-BBEE Status Level of Contributor	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)
1	10	20
2	9	18
3	6	14
4	5	12
5	4	8

6	3	6
7	2	4
8	1	2
Non-compliant contributor	0	0

5. BID DECLARATION

5.1 Bidders who claim points in respect of B-BBEE Status Level of Contribution must complete the following:

6. B-BBEE STATUS LEVEL OF CONTRIBUTOR CLAIMED IN TERMS OF PARAGRAPHS 1.4 AND 5.1

6.1 B-BBEE Status Level of Contributor: . =(maximum of 10 or 20 points)
 (Points claimed in respect of paragraph 6.1 must be in accordance with the table reflected in paragraph 5.1 and must be substantiated by relevant proof of B-BBEE status level of contributor.

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 (BBBEE status level) 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:

Part 3-Schedule F

Qualification and Experience

1. Details of the extent of the company activities and business, e.g. branches etc:

2. A list of existing and/or previous contracts relating to similar services:

Description of work and value	Period		Organization	Contact Person	Contact No
	Start date	End date			

3. Details of Qualifications of the Project Manager and the Key Personnel:

Name	Designation	Qualifications

.....
SIGNATURE OF (ON BEHALF OF) COMPANY

Organisation Type

PARTNERSHIP/CLOSED CORPORATION/COMPANY
(delete which is not applicable)

The bidder comprises of the following partners/members/directors :

- 1. NAME _____
ADDRESS : _____
ID NUMBER: _____
- 2. NAME : _____
ADDRESS : _____
ID NUMBER: _____
- 3. NAME : _____
ADDRESS : _____
ID NUMBER: _____
- 4. NAME : _____
ADDRESS : _____
ID NUMBER: _____
- 5. NAME : _____
ADDRESS : _____
ID NUMBER: _____

.....
SIGNATURE OF (ON BEHALF OF) BIDDER

Part 3- Schedule I

Details of Supplier's Office

1. Physical address of supplier's office

2. Telephone No of office: _____

3. Time period for which such office has been used by supplier: _____

.....
SIGNATURE OF (ON BEHALF OF) BIDDER

NAME IN CAPITAL LETTERS

In the presence of:

1. _____

2. _____

Part 3- Schedule I

Financial Particulars

This schedule must be completed by the bidder and submitted together with the bid. Documentary proof confirming availability of financial resources to execute the contract from the bidder's financial institution and /or Audited Financial Statements must be submitted with the bid. If this requirement is not complied with in full the bid will be considered invalid

Nature of Service: _____

Name of bidder: _____

Bid Number: _____

	<p><u>FINANCIAL POSITION OF BIDDER</u></p> <p>I/we hereby certify that I/we have the necessary financial capacity and resources to execute the above contract successfully for the bid amount. I / we hereby attach letter confirming availability of financial resources from the financial institution. I / we give the SSA permission to contact the financial institution below to confirm the information provided.</p> <p>In the absence of the above, a letter confirming that the bidder has applied for financial assistance from any financial institution and that the institution is willing to favourably consider such application in the event that the bidder is successful, will also satisfy the Department.</p>
NAME OF FINANCIAL INSTITUTE	
ADDRESS	
TEL.NO	
FAX NO.	
CONTACT PERSON	

SIGNATURE OF (ON BEHALF OF) BIDDER

NAME IN CAPITALS

In the presence of :

1. _____

2. _____

SECURITY CLEARANCE REQUIREMENTS

DECLARATIONS

A. Does the business meet the government’s Black Economic Empowerment requirements as per the relevant industry charter?

Yes: No:

If YES Explain:

.....
.....
.....
.....
.....
.....

B. Do you declare that the business is NOT a BEE front company?

Yes: No:

If NO Explain:

.....
.....
.....
.....
.....
.....

C. Does the business have any associated family? Friends or business associates in the employ of the Ministry of Intelligence?

Yes: No:

If YES Explain:

.....
.....
.....
.....
.....

CONFIDENTIAL

D. Do any of the above mentioned in Declaration C have any financial interest in the business?

Yes: No:

If YES Explain:

.....
.....
.....
.....
.....

E. Do you declare that the company is currently in a stable and sustainable financial position

Yes: No:

If YES Explain:

.....
.....
.....
.....
.....

F. Has the business done any work for a foreign government intelligence agency?

Yes: No:.....

If YES Explain:

.....
.....
.....
.....
.....

G. Has the business or any of its principals/ employees obtained a security clearance from any foreign or local governmental institution?

Yes: No:

If YES Explain:

.....
.....
.....
.....
.....

CONFIDENTIAL

THE CONTENTS OF THIS DECLARATION FORM MUST BE CERTIFIED AS CORRECT

Hereby the undersigned certifies that:

1. Note is taken that the completed declaration is for official use only and will be treated as strictly **CONFIDENTIAL**.
2. The information stated in this declaration is accurate and true and note is taken that false information will have a negative effect on the security clearance of the _____ company and its principals.
3. The signatory will be held immediately responsible for any fraudulent or incorrect information provided.

Company:

Respondents name:

I.D. number:

Position:

Date:

Signature: