

<b>RFQ NUMBER</b>	<b>RFQ/MICT/61/2023</b>
<b>RFQ DESCRIPTION</b>	<b>APPOINTMENT OF SERVICE PROVIDER TO CONDUCT A TRACER STUDY FOR MICT SETA.</b>
<b>RFQ ISSUE DATE</b>	<b>13 SEPTEMBER 2023</b>
<b>BRIEFING SESSION</b>	<b>N/A</b>
<b>CLOSING DATE &amp; TIME</b>	<b>20 SEPTEMBER 2023 @ 11:00 AM RFQ submitted after the stipulated closing date and time will not be considered.</b>
<b>LOCATION FOR SUBMISSIONS</b>	<a href="mailto:rfqs@mict.org.za">rfqs@mict.org.za</a>
<b>NO: OF DOCUMENTS</b>	<b>1 SOFT COPY</b>

For queries, please contact [rfqs@mict.org.za](mailto:rfqs@mict.org.za) **before the closing date of this RFQ.**

The MICT SETA requests your quotation on the services listed above. Please furnish us with all the information as requested and return your quotation on the date and time stipulated above. **Late and incomplete submissions will invalidate the quote submitted.**

SUPPLIER NAME: \_\_\_\_\_

NATIONAL TREASURY (CSD) SUPPLIER NUMBER: \_\_\_\_\_

POSTAL ADDRESS: \_\_\_\_\_

TELEPHONE NO: \_\_\_\_\_

E MAIL ADDRESS: \_\_\_\_\_

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

CELL NO: \_\_\_\_\_

SIGNATURE OF BIDDER: \_\_\_\_\_

**SUPPLIER REGISTRATION ON CSD**

Prospective suppliers must register on the National Treasury Central Supplier database in terms of National Treasury circular no 4A of 2016/17. The bidder shall register prior submitting a proposal/bid.

## RETURNABLE DOCUMENTS CHECKLIST

**quotation invitation document must be completed, signed and submitted as a whole** by the authorised Company representative. All forms must be properly completed, list below serve as a checklist of your RFQ submission.

(Tick in the relevant block below)

DESCRIPTION	YES	NO
<b>CSD</b> Central Supplier Database (CSD) Registration Report		
Pricing Schedule		
Valid Tax Clearance Certificate (S) and or proof of application endorsed by <b>SARS</b> and/or <b>SARS</b> issued verification pin		
<b>SBD 4 – Bidder’s Disclosure</b>		
<b>SBD 6.1 - Preferential Procurement Claim Form</b>		
Director(s) Certified ID copy		
CIPC registration documents		
Share certificates		

**Note: This RFQ must be completed and signed by the authorised company representative**

## MICT SETA –QUOTATION CONDITIONS

### 1. QUOTATION CONDITIONS

NOTE: Quotation for the supply of goods or services described in this document are invited in accordance with the provision of Government Procurement: General Conditions of Contract available for download from <http://www.treasury.gov.za/divisions/ocpo/sc/GeneralConditions/>

- a. **MICT SETA** does not bind itself to accept the lowest or any RFQ, nor shall it be responsible for or pay any expenses or losses which may be incurred by the bidder in the preparation and delivery of the RFQ.
- b. No RFQ shall be deemed to have been accepted unless and until a formal contract/letter of intent is prepared and executed.

#### 1.1 MICT SETA reserves the right to:

- a. Not evaluate and award RFQ that do not comply strictly with the requirements of this RFQ.
- b. Make a selection solely on the information received in the RFQs and Enter into negotiations with any one or more of the preferred bidder(s) based on the criteria specified in the evaluation of this RFQ.
- c. Contact any bidder during the evaluation process, in order to clarify any information, without informing any other bidders, and no change in the content of the RFQ shall be sought, offered, or permitted.
- d. Award a contract to one or more bidder(s).
- e. Withdraw the RFQ at any stage
- f. Accept a separate RFQ or any RFQ in part or full at its own discretion.
- g. Cancel this RFQ or any part thereof at any stage as prescribed in the PPPFA regulation.
- h. Select the bidder(s) for further negotiations based on the greatest benefit to MICT SETA and not necessarily on the basis of the lowest costs

### 2. COST OF BIDDING

The bidder shall bear all costs and expenses associated with the preparation and submission of its RFQ or RFQ, and the MICT SETA shall under no circumstances be responsible or liable for any such costs, regardless of, without limitation, the conduct or outcome of the bidding, evaluation, and selection processes.

## DETAILED TECHNICAL SPECIFICATION

### **1. Background & context**

The Media, Information and Communication Technology Sector Education and Training Authority ("MICT SETA") is a statutory body established through the Skills Development Act, No. 97 of 1998 section 10 (1) (a). The SETA has a mandate to facilitate skills development. Adhering to the key principles of the Skills Development Act and the National Skills Development Plan (NSDP), the SETA seeks to facilitate alignment between skills supply and demand by enhancing the linkages between institutional and workplace learning. The mandate adopted by the SETA derives from the broader plan of government, namely the NDP, which aims to put in place the framework whereby, capabilities of South African citizens are built.

The SETA was established to offer support to its stakeholders through skills development imperatives within the Advertising, Electronic Media and Film, Electronics, Information Technology and Telecommunications sub-sectors.

Within these sub-sectors, the MICT SETA is responsible for the following:

- Development of a Sector Skills Plans (SSP) within the framework of the National Skills Development Plan (NSDP).
- Implementation of the SSP.
- Development and administration of Learnerships.
- Support of the implementation of the National Qualifications Framework (NQF).
- Quality assurance of sector learning interventions.
- Disbursement of levies collected from employers in their sector; and reporting to the Minister and the South Africa Qualifications Authority (SAQA).

### **2. Purpose**

The purpose of this request is to invite suitably qualified and experienced service providers to submit proposals to help the SETA in conducting an empirical research project on tracking learners in the following SETA-funded learning programmes:

- Learnerships
- Internships
- Skills Programmes
- Short learning Programmes
- Bursary Programmes

The project will serve to understand, explore, and document key features, trends, challenges, outcomes, and impact of skills interventions in the MICT SETA sub-sectors. Fundamentally, the research project will assist in further developing a sustainable skills development strategy for the MICT SETA.

The primary focus of the study will be to understand the effects of workplace-based learning (WBL) programmes on the lives of the general population within the MICT sector. The focus will be primarily to:

- Assess the employment status (employed, self-employed and unemployed)
- Assess the link between obtained employment and MICT SETA programmes
- Employment rates
- Link between qualifications attained and occupations
- Nature of employment in terms of employment sector or types of employment (e.g. formal or informal); tenure (Part time or full time);
- salary level; benefits (UIF, pension, medical aid, allowances)

### **3. Objectives**

The study aims to address the following related objectives:

- To determine the destinations of learners who have completed learnerships, internships, skills programmes, short learning programmes and bursary programmes.
- To understand the factors associated with employment/unemployment.
- To understand the intricacies of the articulation of qualifications into occupations.
- To determine the nature of employment of learners who received employment.

### **4. Specific research questions.**

The research study seeks to answer the following specific questions:

- What are destinations of students who complete WBL?
- Are they employed?
- Are they not working?
- Are they studying further?

If employed:

- Where are they employed (in which sector or Industry)?
- What is their occupation?
- Has there been a change in jobs since completing the learning programmes?
- After WBL has there been a difference in rank/ post level?
- Are they employed full-time or part time?
- What are their wages?
- What benefits and allowances are they getting?
- If not in employment, why?
- Are they studying full-time?
- Are they looking for employment?
- Are they looking after parents, siblings?

## **5. Scope of work**

The consultancy is expected to:

1. Develop appropriate methodology for the tracer study.
2. Trace graduates funded by the MICT SETA.
3. Assess demographics, qualifications, occupational profiles.
4. Evaluate employment and income status.
5. Evaluate employer satisfaction on the performance of the graduates
6. Explore the challenges for sustainability of employment and career progression of the graduates.
7. Evaluate socio-economic changes of graduates and their families.
8. Assess relevance, effectiveness efficiency, sustainability and impact of MICT SETA programmes.
9. Provide data driven recommendations.

## **6. Methodology and approach**

The required composition of the sample size should represent not less than 25% of the overall cohort (learnerships, internships, skills programmes, bursary, and short learning programmes), proportionately randomly selected to represent all the geographical and development regions where MICT SETA implements its learning programmes. Mixed methods of both quantitative and qualitative approaches will have to be employed:

1. Make use of (telephonic interviews and an online survey)
2. The service provider is expected to follow the sampling guidelines that ensure a stratified random sample of completers.
3. Deliver interview data in excel format approved by the SETA.
4. Deliver a report on key Outcome indicators.

## **7. Competency and expertise requirements**

The consulting firm must have at least 3-5 years' experience in conducting similar national level research preferably, for TVET or higher education training institutions. The consultancy should also have the capacity to mobilize a team of relevant experts and enumerators meeting the below stated qualifications and professional requirements and evidence of high level analytical, qualitative and quantitative research ability. The expert team to be involved in the study should be composed as follows:

### **7.1. Team Leader**

A master's degree in the disciplines of Development Studies, Statistics, Research, monitoring and evaluation, and Social Sciences. A doctoral degree in any one of the above disciplines will be added as an advantage, as well as a proven track record in leading research projects for educational institutions or purposes, and/or lecturing in disciplines involving research, development, monitoring and evaluation. Experience in project cycle management is also preferred.

## **7.2. Supporting Staff**

Diploma/Degree in any discipline related to education and training, statistics, commerce, previous experience as enumerator/data collector for social science, demographic, or similar surveys, as well as user level skills in Microsoft office suites.

## **8. Quality and reporting requirements**

The service provider will report directly to the Senior Manager: Monitoring and Evaluation. However, the quality management of the service and performance must be overseen by the service provider.

## **9. Experience in the requested services**

Service providers (Professionals/Companies) should be able to demonstrate prior experience of similar projects undertaken and successfully completed for them to qualify.

## **10. Proposed Methodology**

The service provider must provide a detailed proposal, articulating, amongst other things, the following:

- Methodology/approach to be used to carry out the assignment as per ToR.
- The service provider's proposal must clearly and separately deal with the immediate scope and ad hoc services.
- Proposed timelines of delivering on the immediate scope; and indicative response times for attending and delivering on ad hoc services.

## 11. PRICING SCHEDULE

Name of bidder \_\_\_\_\_

RFQ number: \_\_\_\_\_

Closing date \_\_\_\_\_

Bid shall remain valid for acceptance for a period of **90 days** counted from the closing date.

Bidders to provide further cost breakdown where necessary under each line item, and sub-total and the overall RFQ price (Total) should be included. The below table is for illustration only:

Item	Requirement Description	Quantity	Unit Cost	Total Cost (Excl. VAT)
	APPOINTMENT OF SERVICE PROVIDER TO CONDUCT A TRACER STUDY FOR MICT SETA			
1.	APPOINTMENT OF SERVICE PROVIDER TO CONDUCT A TRACER STUDY FOR MICT SETA.	1	R	R
<b>Sub-Total</b>				<b>R</b>
<b>VAT@15%</b>				<b>R</b>
<b>TOTAL PRICE (INCLUDING VAT)</b>				<b>R</b>

Complete below:

1. Delivery Address: **MICT SETA Head Office, Midrand, Halfway House, 1685**
2. Indicate Delivery period after order receipt.....
3. Is delivery period fixed? **Yes/ No**
4. Is the price(s) fixed? **Yes/ No**
5. Is the quote strictly to specification? **Yes/ No**

I/We, the undersigned, agree that this bidding price shall remain binding on me/us and open for acceptance for the period stipulated above.

Authorised Company Representative: .....

Capacity under which this quote is signed.....

Signature: .....

Date: .....

## 12. EVALUATION CRITERIA

### EVALUATION CRITERIA

The MICT SETA complies with the provisions of the Public Finance Management Act, Act No. 1 of 1999 as amended; Treasury Regulations of 2005; the Preferential Procurement Policy Framework Act, Act No. 5 of 2000; Preferential Procurement Regulations of 2022; and the MICT SETA Supply Chain Management (SCM) Policy.

RFQ's received will be evaluated on Functionality criteria and Price & Specific goals.

### FUNCTIONAL EVALUATION CRITERIA

RFQ proposals submitted will be evaluated on technical functionality criteria out of a maximum of **100 points**. A threshold of **70 points** out of the **100 points** has been set.

Only bidders that have met or exceeded the qualification threshold on technical functionality of **70 points** will be evaluated further on price and specific goals.

**Note:** All bidders achieving less than the set threshold will be declared non-responsive. Assessment of evaluation of the functional/ technical criteria will be based on the table below:

Category	Criteria	Weight Score
<b>Methodology</b>	<p>The service provider must submit a detailed methodology demonstrating:</p> <ul style="list-style-type: none"><li>• Understanding of the appropriate methodology for the tracer study.</li><li>• The approach to data collection</li><li>• Approach to determining the right sample size, and project plan.</li></ul> <p><b>Points for submitting detailed methodology will be allocated as follows:</b></p> <ul style="list-style-type: none"><li>• Methodology provided only meets one of the elements stated above = <b>0 points</b></li><li>• Methodology provided partially meets expectation, only meets two elements as stated above = <b>15 points</b></li></ul>	<b>20</b>

	<ul style="list-style-type: none"> <li>Methodology provided meets all expectations/elements stated above = <b>20 points</b></li> </ul>	
<b>Research Reports (Samples)</b>	<p>The bidder must attach research reports (<b>signed samples</b> by the client where services were rendered) of previous work completed for similar research projects conducted, specifically for Tracer/Impact study.</p> <p><b>Points for submitting signed Research Reports (Samples) will be allocated as follows</b></p> <ul style="list-style-type: none"> <li>no evidence = <b>0 points</b></li> <li>provision of 2 samples = <b>15 points</b></li> <li>provision of 3 or more samples = <b>30 points</b></li> </ul>	<b>30</b>
<b>Project team Organogram</b>	<p>Bidder must provide composition of the project team Organogram that will work on this project with clearly articulated roles and responsibilities for each member.</p> <p><b>Points for submitting project team organogram will be allocated as follows</b></p> <ul style="list-style-type: none"> <li>Project team Organogram with member roles and areas of responsibility presented = <b>10 Points</b></li> <li>No Project team Organogram with member roles and areas of responsibility presented = <b>0 Points</b></li> </ul>	<b>10</b>

<p><b>Project Team Capacity</b></p>	<p>The bidder must attach curriculum Vitae(s) of the individual project incumbent(s):</p> <p><b>Team leader:</b> Must have a masters degree in any of the following disciplines: Development Studies/ Statistics/ Research/ monitoring and evaluation/ and Social Sciences. A doctoral degree in any one of the above disciplines will be added as an advantage,</p> <p>The bidder must submit Team leader's certified copies of qualifications and resume clearly indicating a proven track record in leading research projects for educational institutions or purposes, and/or lecturing in disciplines involving research, development, monitoring and evaluation. Experience in project cycle management is also preferred. the projects, project duration, and names of clients. <b>(10) (the cv/profile must clearly state that it is for the team leader and failure to indicate that the cv/profile will not be taken into consideration)</b></p> <p><b>Points for submitting team leader's certified copies of qualifications will be allocated as follows:</b></p> <ul style="list-style-type: none"> <li>• Submission team leader's certified copies of qualifications = <b>05 Points</b></li> <li>• Non submission of team leader's certified copies of qualifications = <b>0 Points</b></li> </ul> <p><b>Points for submitting team leader's cv/resume will be allocated as follows:</b></p> <ul style="list-style-type: none"> <li>• 5 years and above experience in the relevant field = <b>05 Points</b></li> <li>• 3 – 4 years' experience in the relevant field = <b>03 Points</b></li> <li>• 1 – 2 years' experience in the relevant field = <b>02 Points</b></li> <li>• Non submission of certified copies of qualification and resume = <b>0 Points</b></li> </ul> <p><b>Supporting staff:</b></p> <p>Diploma/Degree in any of the following disciplines: education and training/ statistics/ commerce.</p> <p>The bidder must submit Supporting staff's certified copies of qualifications and resume clearly indicating previous experience as enumerator/data collector for social science, demographic, or similar surveys, as well as user level skills in Microsoft office suites. <b>(10) (the cv/profile must clearly state that it is for the supporting staff and failure to indicate that the cv/profile will not be taken into consideration)</b></p>	<p><b>20</b></p>
-------------------------------------	---	------------------

	<p><b>Points for submitting supporting staff's certified copies of qualifications will be allocated as follows</b></p> <ul style="list-style-type: none"> <li>• Submission supporting staff's certified copies of qualifications = <b>05 Points</b></li> <li>• Non submission of supporting staff's certified copies of qualifications = <b>0 Points</b></li> </ul> <p><b>Points for submitting supporting staff's cv/resume will be allocated as follows</b></p> <ul style="list-style-type: none"> <li>• 5 years and above experience in the relevant field = <b>05 Points</b></li> <li>• 3 – 4 years' experience in the relevant field = <b>03 Points</b></li> <li>• 1 – 2 years' experience in the relevant field = <b>02 Points</b></li> <li>• Non submission of certified copies of qualification and resume = <b>0 Points</b></li> </ul>	
<p><b>Company Experience</b></p>	<p><b>Company Profile and Experience</b></p> <p>The service provider must submit its business profile demonstrating 3-5 years' experience in conducting tracer study/similar provincial and national level research, not limited to, but preferably for SETAs, Stats SA, higher education training institutions.</p> <p>The company profile must be accompanied by list of related projects undertaken and contactable references, the supporting signed reference letters must be in a client's letter head, advocating for good performance as per relevant tracer study/similar project implemented.</p> <p><b>Points for submitting company profile will be allocated as follows</b></p> <ul style="list-style-type: none"> <li>• Profile does not demonstrate experience on tracer study/similar research conducted and there is no list of related projects undertaken = <b>0 points</b></li> <li>• The profile of the submitting company demonstrates tracer/similar research conducted and there is a list of related projects undertaken = <b>05 points</b></li> </ul> <p><b>Points for submitting reference letters will be allocated as follows</b></p> <ul style="list-style-type: none"> <li>• No contactable, signed reference letters from clients indicating good performance as per relevant project implemented = <b>0 points</b></li> </ul>	<p><b>20</b></p>

	<ul style="list-style-type: none"> <li>• One (1) contactable, signed reference letter submitted in a client's letter head, indicating good performance as per relevant project implemented = <b>05 points</b></li> <li>• Two (2) contactable, signed reference letters submitted in a client's letter head, indicating good performance as per relevant project implemented = <b>10 points</b></li> <li>• Three (3) contactable, signed reference letters submitted in a client's letter head indicating good performance as per relevant project implemented = <b>15 points</b></li> </ul>	
	<b>Total</b>	<b>100</b>
	<b>Qualifying Threshold</b>	<b>70</b>

**N.B: Only bidders who meet the threshold of 70 points out of 100 points on functional criteria will be further evaluated for price & specific goals.**

## PRICE AND SPECIFIC GOALS

Only bidders that have met the requirements of the Mandatory Criteria will qualify for further evaluation on Price and Specific Goals according to the 80/20 preference point system in terms of the Preferential Procurement Regulations 2022, where 80 points will be for Price and 20 points will be for Specific Goals.

Specific Goal to be evaluated out of **20 Points**:

Special Goal Criteria	Points
Enterprise which is at least 51% owned by historically disadvantaged persons.	10
Enterprise which is at least 51% owned by historically disadvantaged women.	05
Enterprise which is at least 51% owned by historically disadvantaged youth.	05
<b>Total</b>	<b>20</b>

**\*\* Enterprises that are not owned by historically disadvantaged persons will be allocated 0 points.**

**Bidder must submit the following documents:**

- Certified ID copies of the company's directors as per the CIPC documents.
- CIPC Documents  
And/or
- Shareholder Certificate (for companies that have two or more directors as per CIPC document)

**Failure on the part of a service provider to submit proof or documentation required in terms of this RFQ to claim points for specific goals, will be interpreted to mean that preference points for specific goals are not claimed.**

## BIDDER'S DICLOSURE

### 1. PURPOSE OF THE FORM

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

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

### 2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest<sup>1</sup> in the enterprise, employed by the state? **YES/NO**

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

Full Name	Identity Number	Name of State institution

---

<sup>1</sup> 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.

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

2.2.1 If so, furnish particulars:

.....  
.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

2.3.1 If so, furnish particulars:

.....  
.....

### 3 DECLARATION

I, the undersigned, (name)..... in submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium<sup>2</sup> will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide

---

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

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 PROCUREMENT CLAIM FORM

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

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

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

#### 1 GENERAL CONDITIONS

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

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- 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.
- b) the **80/20 preference point system** will be applicable in this tender. The lowest/highest acceptable tender will be used to determine the accurate system once tenders are received.

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

(a) Price; and

(b) Specific Goals.

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

The maximum points for this tender are allocated as follows:

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

1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

## 2 DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

## 3 FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

### 3.1. POINTS AWARDED FOR PRICE

#### 3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

A maximum of 80 or 90 points is allocated for price on the following basis:

$$Ps = 80 \left( 1 - \frac{Pt - Pmin}{Pmin} \right) \quad \text{or} \quad Ps = 90 \left( 1 - \frac{Pt - Pmin}{Pmin} \right)$$

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 or 90 points is allocated for price on the following basis:

$$80/20 \quad \text{or} \quad 90/10$$

$$Ps = 80 \left( 1 + \frac{Pt - Pmax}{Pmax} \right) \text{ or } Ps = 90 \left( 1 + \frac{Pt - Pmax}{Pmax} \right)$$

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: The tenderer must indicate how they claim points for each preference point system.)**

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Enterprises which are at least 51% owned by historically disadvantaged persons.	10	
Enterprises which are at least 51% owned by historically disadvantaged women.	5	
Enterprises which are at least 51% owned by historically disadvantaged youth.	5	

#### DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name of company/firm.....

4.4. Company registration number: .....

4.5. TYPE OF COMPANY/ FIRM

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

[TICK APPLICABLE BOX]

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
  - (a) disqualify the person from the tendering process;
  - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
  - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
  - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
  - (e) forward the matter for criminal prosecution, if deemed necessary.

.....  
**SIGNATURE(S) OF TENDERER(S)**

**SURNAME AND NAME:** .....

**DATE:** .....

**ADDRESS:** .....

.....

.....

.....