



**YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE MEDIA INFORMATION AND
COMMUNICATIONS TECHNOLOGIES SECTOR EDUCATION AND TRAINING AUTHORITY**

REQUEST FOR BID REF: MICT/SETA/MNE/14/2025

REQUIREMENT DESCRIPTION:

**APPOINTMENT OF A PANEL OF SERVICE PROVIDERS FOR THE PROVISION OF
MONITORING AND EVALUATION RESEARCH SERVICES FOR A PERIOD OF THREE (3)
YEARS.**

BID CLOSING DATE: 22 JANUARY 2026 at 11:00 AM (SOUTH AFRICAN TIME)



BID REFERENCE NUMBER	MICT/SETA/MNE/14/2025
BID DESCRIPTION	APPOINTMENT OF A PANEL OF SERVICE PROVIDERS FOR THE PROVISION OF MONITORING AND EVALUATION RESEARCH SERVICES FOR A PERIOD OF THREE (3) YEARS.
SUPPLIER BRIEFING SESSION	<u>Non-Compulsory Virtual Briefing Session will be held as follows:</u> Date: 14 January 2026, Time: 10:00 am South African Time Location: Microsoft Teams, Meeting ID: 319 195 139 518 20 Passcode: yX2EE2fy
BID CLOSING DATE & TIME	22 January 2026 @ 11:00 am South African Time. *Note: A bid will not be considered if it arrives a second after 11:00 am or any time thereafter. Bidders are therefore strongly advised to ensure that bids are dispatched allowing enough time for any unforeseen events that may delay the delivery of the bid.
INSTRUCTION FOR SUBMISSION OF BID	<u>NB:</u> Bid must be received in a sealed envelope (1 hard copy and 1 USB) marked with this RFB reference number and deposited in a tender box at the location indicated hereunder.
LOCATION FOR BID SUBMISSIONS	MICT SETA Head Office: Reception 19 Richards Drive, Gallagher Convention Centre West Wing, level 3 Midrand
BID VALIDITY PERIOD	Bids received shall remain valid for acceptance for a period of 120 days counted from the closing date of the bid.

CLARIFICATION AND COMMUNICATION

- All enquiries relating to this bid must be addressed in writing to bidqueries@mict.org.za five (5) days **before the closing date and time**. Queries received after this period will not be entertained.
- The bid reference number must be mentioned in all correspondences.
- Bids sent to any other platform other than the one specified herein will not be considered for evaluation. It is the bidder's responsibility to ensure that the bid is sent to the correct platform and that this is received by the MICT SETA before the closing date and time in MICT SETA's dedicated platform
- All the documentation submitted in response to this RFP must be in English.

Note: Bidders are advised that a response will be disqualified should any attempt be made by a bidder either directly or indirectly to canvass any officer(s) or employees of **MICT- SETA** in respect of the RFB, between the closing and award date of the business.



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SECTION 1: CHECKLIST INFORMATION

RETURNABLE DOCUMENTS CHECKLIST

Request For Bid 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 RFB submission.

(Tick in the relevant block below)

DESCRIPTION	YES	NO
CSD Central Supplier Database (CSD) Registration Report.		
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.		
SBD 1 - Fully completed with required proof (Where applicable)		
CIPC registration documents		
Bidder's eligibility: Form A		
Valid Tax Clearance Certificate (S) and or proof of application endorsed by SARS / and or SARS issued verification pin		
SBD 4 - Declaration of interest		
SBD 6.1: Preferential Procurement Claim Form		
Copy of joint venture/ consortium or sub-contracting agreement duly signed by all parties. (Where applicable)		
Certified Copy of director(s) ID(s) not older than (six) 6 months		
Shareholding Certificate (Where applicable)		
Financial Statements for 2023/2024 FY of the bidder		

Note: This BID must be completed and signed by the authorised Company representative



SECTION 2: MICT SETA -BID CONDITIONS

1. BID CONDITIONS

- a. MICT SETA considers this bid and all related information, either written or verbal, which is provided to the respondent, to be proprietary to MICT SETA. The respondent shall not disclose, publish, or advertise this RFB or related information to any third party without the prior written consent of MICT SETA.
- b. Bids 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/>
- c. MICT SETA does not bind itself to accept the lowest or any RFB, 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 RFB.
- d. No Bid shall be deemed to have been accepted unless and until a formal contract / letter of intent is prepared and executed.
- e. The technical proposal shall not include any price or financial information, technical proposal containing material financial information may be declared non-responsive.

1.1 MICT SETA reserves the right to:

- a. Not evaluate or award RFB that do not comply strictly with the requirements of this RFB.
- b. Make a selection solely on the information received in the RFBs and Enter into negotiations with any one or more of preferred bidder(s) based on the criteria specified in the evaluation of this RFB.
- 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 RFB shall be sought, offered or permitted.
- d. Award a contract to one or more bidder(s).
- e. Withdraw or amend the RFB at any stage.
- f. Accept a separate RFB or any RFB in part or full at its own discretion.
- g. Cancel this RFB or any part thereof at any stage as prescribed in the PPPFA regulation.

2. COST OF BIDDING

The bidder shall bear all costs and expenses associated with preparation and submission of its RFB or RFB, 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 process.

3. EXTENSION OF PROPOSAL VALIDITY PERIOD

In exceptional circumstances, prior to the expiration of the proposal validity period, MICT SETA may request Bidders to extend the period of validity of their bid proposals in writing and shall be considered integral to the proposal.

**SECTION 3: FORM A: BIDDER'S ELIGIBILITY FORM****Name of Bidder:****RFB Number:**

We, the undersigned, offer to provide the required services in accordance with the above Request for quotation and hereby declare that our firm, persons, or its directors, including any JV/Consortium /Association members or subcontractors or suppliers for any part of the contract:

- a) is not under procurement prohibition by National Treasury, *from doing business with the public sector,"*
- b) have not declared bankruptcy, are not involved in bankruptcy or engaged in corrupt / fraudulent practices, and there is no judgment or pending legal action against them that could impair their operations in the foreseeable future;
- c) undertake not to engage in prescribed practices, including but not limited to corruption, fraud, coercion, collusion, obstruction, or any other unethical practice, with the MICT SETA or any other party, and to conduct business in a manner that averts any financial, operational, reputational or other undue risk to the MICT SETA.
- d) *We declare that all the information and statements made in this Proposal are true and we accept that any misinterpretation or misrepresentation contained in this RFQ submission may lead to elimination of our RFQ submission.*

Name: _____

Title: _____

Date: _____

Signature: _____


SBD 1: PART A: INVITATION TO BID

SUPPLIER INFORMATION				
NAME OF BIDDER				
POSTAL ADDRESS				
STREET ADDRESS				
TELEPHONE NUMBER	CODE		NUMBER	
CELLPHONE NUMBER				
FACSIMILE NUMBER	CODE		NUMBER	
E-MAIL ADDRESS				
COMPANY REGISTRATION NUMBER				
DATE OF REGISTRATION				
VAT REGISTRATION NUMBER				
	TCS PIN:		OR	CSD No:
AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA) AND NAME THE APPLICABLE IN THE TICK BOX	<input type="checkbox"/>	AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA)		
	<input type="checkbox"/>	A VERIFICATION AGENCY ACCREDITED BY THE SOUTH AFRICAN ACCREDITATION SYSTEM (SANAS)		
	<input type="checkbox"/>	A REGISTERED AUDITOR		
	<input type="checkbox"/>	NAME:		
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ANSWER PART B:3 BELOW]
SIGNATURE OF BIDDER		DATE	
CAPACITY UNDER WHICH THIS BID IS SIGNED (Attach proof of authority to sign this bid; e.g. resolution of directors, etc.				
TOTAL NUMBER OF ITEMS OFFERED	Refer to pricing schedule/costing		TOTAL BID PRICE (ALL INCLUSIVE)	Refer to pricing schedule/costing



PART B: TERMS AND CONDITIONS FOR BIDDING

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 ONLINE.
- 1.3. BIDDERS MUST REGISTER ON THE CENTRAL SUPPLIER DATABASE (CSD) TO UPLOAD MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS; AND BANKING INFORMATION FOR VERIFICATION PURPOSES).
- 1.4. WHERE A BIDDER IS NOT REGISTERED ON THE CSD, MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS MAY NOT BE SUBMITTED WITH THE BID DOCUMENTATION.
- 1.5. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER LEGISLATION OR SPECIAL CONDITIONS OF CONTRACT.

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 VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.
- 2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE WWW.SARS.GOV.ZA.
- 2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS TOGETHER WITH THE BID.
- 2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE PROOF OF TCS / PIN / CSD NUMBER.
- 2.6 WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.

QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS

- 3.1. IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? ☐ YES ☐ NO
- 3.2. DOES THE BIDDER HAVE A BRANCH IN THE RSA? ☐ YES ☐ NO
- 3.3. DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA? ☐ YES ☐ NO
- 3.4. DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA? ☐ YES ☐ NO

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

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



SECTION 4: BIDDING STRUCTURE

Bidding structure

Indicate the type of bidding structure by marking with an 'X':

Individual bidder	
Joint Venture	
Consortium	
Subcontractors	
Other	

If the bid is submitted as a Consortium or Joint Venture or Sub-Contracting Arrangement list the members of such Consortium or Joint Venture and Sub-Contractors below:

Bidder's Information (includes bids submitted Individual or as a Consortium or Joint Venture)

Supplier size type (Large or QSE or EME)	
First time business with MICT SETA (Yes/No)	
Number of existing running contracts and total value	
Total number of Employees	

Entity ownership

Ownership category	% of ownership
Black or historically disadvantage individual owned	
Black women owned	
Black youth owned	
People living with disability	
Military veteran	
Other ownership	
Total (100%)	

**SECTION 5:**
ANNEXURE A: TERMS OF REFERENCE /SPECIFICATION**APPOINTMENT OF A PANEL OF SERVICE PROVIDERS FOR THE PROVISION OF MONITORING
AND EVALUATION RESEARCH SERVICES FOR A PERIOD OF THREE (3) YEARS.****1. INTRODUCTION**

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). 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 MICT SETA plays a pivotal role in achieving South Africa's skills development and economic growth within the 5 distinct sub-sectors it operates in, i.e. Advertising, Film and Electronic Media, Electronics, Information Technology, and Telecommunications.

2. BACKGROUND

- 2.1. 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.
- 2.2. Within these sub-sectors, the MICT SETA is responsible for the following:
 - 2.2.1. Development of a Sector Skills Plans (SSP) within the framework of the National Skills Development Plan (NSDP).
 - 2.2.2. Implementation of the SSP.
 - 2.2.3. Development and administration of Learnerships.
 - 2.2.4. Support of the implementation of the National Qualifications Framework (NQF).
 - 2.2.5. Quality assurance of sector learning interventions.
 - 2.2.6. Disbursement of levies collected from employers in their sector; and reporting to the Minister and the South Africa Qualifications Authority (SAQA).
 - 2.2.7. Implementation and accounting on the Service Level Agreement between the Department of Higher Education and Training and the SETA.
- 2.3. The concept of the appointment of the Panel of Service Providers is considered and supported by the Board of MICT SETA to obtain a variety of skills that will assist improving the Monitoring and Evaluation Function.

3. PURPOSE

The MICT SETA invites suitably qualified and experienced service providers to submit proposals for appointment to a panel of Monitoring and Evaluation service providers.

4. OBJECTIVES

- 4.1. The objective of appointing a panel of M&E service providers is to complement the existing capacity of the MICT SETA M&E division by providing research, consulting, and specialised evaluation services. These services will support the organisation in achieving its strategic and operational goals by:
 - 4.1.1. Tracking the progress of programmes, projects, and policies.
 - 4.1.2. Identifying implementation challenges and areas for improvement.
 - 4.1.3. Assessing the effectiveness and impact of interventions.
 - 4.1.4. Supporting evidence-based decision-making through high-quality analysis and reporting.



- 4.2. Service providers must demonstrate the capability to perform M&E services in accordance with the OECD-DAC evaluation criteria (relevance, effectiveness, efficiency, impact, and sustainability) and any other relevant legislation, policies, and procedures governing monitoring and evaluation in the public sector.

5. SCOPE OF WORK AND REQUIREMENTS

- 5.1. The Service Providers must be able to assist the M&E unit services in investigating and reporting the required studies of MICT SETA as and when required. Impact and Evaluation Studies, Tracer Studies and other ad hoc M&E functions that may be required during the period such as:
- 5.1.1. Achievement of the organisational strategic objectives which include.
- a. Conducting research studies to inform policy, planning, and programme implementation.
 - b. Tracking and analysing the impact of MICT SETA programmes and interventions.
 - c. Producing high-quality reports with actionable findings, clear recommendations and implementation plans.
 - d. Ensuring compliance with applicable laws, regulations, policies, procedures, and contractual obligations related to M&E.
 - e. Supporting the achievement of MICT SETA's strategic objectives through evidence-based evaluations.
- 5.2. The following are amongst others, assignments to be carried out by Service Providers:
- 5.2.1. Evaluation Studies (all types e.g. design; process, implementation, outcome and impact etc)
- 5.2.2. Tracer Studies.
- 5.2.3. Longitudinal Studies.
- 5.2.4. Monitoring of active programmes onsite.
- 5.2.5. Validation of reported Performance Data.
- 5.2.6. Evaluation of compliance with the SETA Policies and business procedures.
- 5.2.7. Ad-hoc M&E services that will be required as and when need arises.

6. QUALITY AND REPORTING

- 6.1. The reports produced during the term will be directed by the Senior Manager: Monitoring and Evaluation and then shared to the rest of the organisations management. With each project assigned to the service provider, it is mandatory to prepare an Inception Report outlining the objectives and aims of the project.
- 6.2. A final report with clear recommendations and findings. The service provider will also be required to prepare an accompanying PowerPoint presentation outlining a summary of the findings and recommendations of the project that will be presented to the management committee and account authority structures of MICT SETA.
- 6.3. All reports are to be approved by the Senior Manager Monitoring and Evaluation prior to their finalisation for quality and alignment purposes.

7. DELIVERABLES

Bidder must comply with the performance of M&E assignments as follows:

- 7.1. Assignments are to be performed in accordance with the OECD frameworks for research studies. Such work shall further be subject to quality assurance reviews by the M&E unit at MICT SETA as and when required.



- 7.2. All reports and research studies will become the property of MICT SETA including raw data that is collected by the service provider, and all data remains confidential as per the POPIA act adhered to by the service provider and MICT SETA. No data may be shared with third parties.
- 7.3. The performance of each assignment shall be in accordance with the approved annual M&E plan, DHET, DMPE guidelines on research evaluations and as per requests made by the M&E Senior Manager.
- 7.4. In carrying out the work, the successful service provider must ensure that their staff maintain their objectivity by remaining independent of the activities they are conducting.
- 7.5. The appointed service provider should involve knowledgeable staff who will be in a position to transfer skills/knowledge to the rest of the M&E team.
- 7.6. On a mutually agreed basis, the Partner/ Director/Project Lead responsible shall meet with the M&E Senior Manager to report on progress of the work on a bi-weekly basis.
- 7.7. Any material non-compliance must be reported immediately to the M&E Senior Manager for further discussion in resolving the issue to avoid delays.
- 7.8. The required deliverables will include Inception report, Data collection instruments and the data sets, Draft reports, Final reports, Power-Point presentations.
- 7.9. The service provider is expected to apply confidentiality and data protection as per the MICT SETA policy and other relevant legislation.
- 7.10. Final approved reports will be submitted as follows:
 - a. One (1) electronic copy in PDF; and
 - b. Ms Word formats.
 - c. Power-Point presentations which will be presented by the service provider to all the MICT SETA governing structures providing a summary of the final presentations of the overall findings and recommendations.
- 7.11. All reports are to follow the MICT SETA corporate identity manual which will be provided.

8. WORKMANSHIP AND SUPERVISION ON SITE

The service provider shall be held responsible for the conduct of their employees and the conduct of their sub-contractor's employees for the full duration of the contract.

9. DURATION OF THE PROJECT

Successful Bidders will be appointed to be part of the panel of Monitoring and Evaluations service providers for a period of three (03) years.

10. OPERATION OF THE PANEL

Appointed bidders on the panel will be engaged on an as-and-when required basis to deliver Monitoring & Evaluation and Research services in line with the MICT SETA's mandate.



SECTION 6: BID EVALUATION CRITERIA

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. Bids received will be evaluated on the following set criteria.

6.1. STAGE 1: FUNCTIONAL EVALUATION CRITERIA

Bids submitted will be evaluated on technical functionality out of a maximum of **100 points**. A threshold of **70** 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 appointed to be part of the panel. **Note:** All bidders achieving less than the set threshold of 70 points will be declared non-responsive.

Assessment of evaluation of the functional/ technical criteria will be based on the table below:

Note: Bidders that do not meet the requirements of set functional criteria will be declared non-responsive.

FUNCTIONAL CRITERIA			
NO.	CATEGORY	FUNCTIONAL EVALUATION CRITERIA	MAX POINTS
1	PORTFOLIO OF EVIDENCE	<p>The bidder must highlight experience in conducting four (04) different studies. The bidder must submit one (01) report for each of the below studies. A total of four (04) approved reports must be submitted covering all listed studies.</p> <p>Previous Studies Conducted:</p> <ol style="list-style-type: none"> 1. Impact Studies 2. Tracer Studies 3. Longitudinal Studies 4. Evaluation Studies Note: The reports should not be older than 5 years. <p>Points on submission of approved reports of previous research conducted will be allocated as follows:</p> <ul style="list-style-type: none"> • The bidder submitted four (04) approved research reports of each of the above listed studies = 20 points • The bidder submitted three (03) approved research reports for only 3 studies = 10 points • The bidder submitted two (02) approved research reports for only 2 studies = 05 points • The bidder submitted one (01) approved research report of 1 study = 02 points • No report(s) provided or submitted report(s) that are not related to the required services = 0 points <p>NB: Submission of four (04) reports that cover only one study will not be allocated full points. One (01) report must be submitted per study.</p>	20



2	BIDDER'S EXPERIENCE	<p>The bidder must provide four (04) reference letters to highlight experience in previous completed projects in the following service areas:</p> <ol style="list-style-type: none"> 1. Impact Studies 2. Tracer Studies 3. Longitudinal Studies 4. Evaluation Studies <p>The reference letters must be on the client's letterhead with contactable details, dated, clearly indicating services rendered and duly signed by authorised personnel.</p> <p>NB: The reference letters must be aligned with the submitted samples/reports.</p> <p>Points on submission of reference letters indicating experience in Impact Studies; Tracer Studies; Longitudinal Studies; Evaluation Studies will be allocated as follows:</p> <ul style="list-style-type: none"> • Bidder provided four (04) signed client reference letters highlighting experience in the above services = 10 points. • Bidder provided three (03) signed client reference letters highlighting experience in the above services = 08 points. • Bidder provided two (02) signed client reference letters highlighting experience in the above services = 04 points. • Bidder provided one (01) signed client reference letter highlighting experience in the above services = 02 points. • Bidder did not provide reference letters or provided reference letters that do not highlight experience in any of the above services = 0 Points <p>Important: Reference lists or award letters or purchase orders (POs) will not be considered for points allocation. In the event of sub-contracting, the bidder must furnish the above reference letters of the main bidder.</p> <p>MICT SETA reserves the right to contact references prior to award.</p>	10
3	QUALITY ASSURANCE PLAN	<p>The bidder must submit a detailed quality assurance plan reflecting procedure and risk mitigation measures.</p> <p>Points for submitting detailed Quality Assurance Plan will be allocated as follows:</p> <ul style="list-style-type: none"> • The bidder submitted a detailed quality assurance plan on procedures and risk mitigation measures = 20 points • The bidder submitted a quality assurance plan not detailing procedures and risk mitigation measures = 0 points 	20
4	METHODOLOGY	<p>The bidder must submit a detailed project methodology highlighting the following elements:</p> <ol style="list-style-type: none"> 1. Planning 2. Execution 3. Reporting 4. Follow-up 5. Completion and handover of the reports within the prescribed project period. (timeframes) <p>Points for submission of methodology will be allocated as follows:</p> <ul style="list-style-type: none"> • The bidder submitted a detailed methodology that covers all five (05) elements = 25 points • The bidder submitted a detailed methodology that covers only four (04) elements = 20 points • The bidder submitted a detailed methodology that covers only three (03) elements = 15 points 	25



		<ul style="list-style-type: none"> • The bidder submitted a detailed methodology that covers only two (02) elements = 10 points • The bidder submitted a detailed methodology that covers only one (01) elements = 05 points • The bidder did not submit a detailed methodology or submitted a methodology that does not cover any of the elements = 0 Points 	
5	TEAM ORGANOGRAM	<p>The bidder must provide a team organogram showcasing team members, their roles, and level of effort of each person involved in the project.</p> <p>Points for submission of a team organogram showcasing team members, their roles, and level of effort will be allocated as follows:</p> <ul style="list-style-type: none"> • The bidder provided a team organogram highlighting the key personnel, roles and level of effort = 05 Points • The bidder did not provide a team organogram/ team organogram does not highlight the key personnel, roles or level of effort = 0 Points 	05
6	TEAM LEAD	<p>The bidder must provide the team lead's CV and qualifications. The team leader must have a Master's degree in the disciplines of Development Studies, Statistics, Research, Monitoring and Evaluation, and Social Sciences. A proven track record in leading research projects for educational institutions or purposes, and/or lecturing in disciplines involving research, development, monitoring and evaluation for fifteen (15) years and above.</p> <p>Bidder must submit certified copies of qualifications not older than 6 months.</p> <p>Experience of Team Lead (05 Points) The bidder's team lead must have at least fifteen (15) years of experience in leading research projects for educational institutions or purposes, and/or lecturing in disciplines involving research, development, monitoring and evaluation.</p> <p>Points for submission of team lead's CV with experience in leading research projects for educational institutions or purposes, and/or lecturing in disciplines involving research, development, monitoring and evaluation for fifteen (15) years and above will be allocated as follows:</p> <ul style="list-style-type: none"> • The bidder submitted CV of the team leader highlighting fifteen (15) years or more of relevant experience = 05 points • The bidder submitted CV of the team lead highlighting less than fifteen (15) years of experience = 0 points <p>Qualification of team lead (05 Points) The bidder's team lead must have a Master's degree in the disciplines of Development Studies, Statistics, Research, Monitoring and Evaluation, and Social Sciences.</p> <p>Points for submission of qualification will be allocated as follows:</p> <ul style="list-style-type: none"> • The bidder submitted the team lead's certified copy of master's degree in the disciplines of Development Studies, Statistics, Research, Monitoring and Evaluation, and Social Sciences = 05 points • The bidder did not submit qualification of the team lead/ Qualification submitted is not equivalent to a master's or not in the related field or not certified within 6 months = 0 points. 	10



7	SUPPORT STAFF	<p>The bidder must provide CVs and certified copies of qualifications of the support staff. The support staff must have at least a 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 for a period of 5 years and above.</p> <p>Bidder must submit certified copies of qualifications not older than 6 months.</p> <p>Experience of support staff (05 Points) Points for submission of CV(s) of support staff with experience as enumerator/data collector for social science, demographic, or similar surveys, as well as user level skills in Microsoft office suites for a period of 5 years and above allocated as follows:</p> <ul style="list-style-type: none"> • The bidder submitted CV(s) of the support staff highlighting five (05) years or more of relevant experience and user level skills = 05 points • The bidder submitted CV(s) of the support staff highlighting less than five (05) years of experience and user level skills = 0 points <p>Qualification(s) of support staff (05 Points) Points for submission of qualification(s) will be allocated as follows:</p> <ul style="list-style-type: none"> • The bidder submitted certified copy(ies) of the support staff's Diploma/Degree in any discipline related to education and training, statistics, or commerce = 05 points • The bidder did not submit qualification of the support staff/Qualification(s) submitted is not equivalent to a diploma/degree or not in the related field or not certified within 6 month = 0 points 	10
TOTAL			100
MINIMUM THRESHOLD			70

Note: Only bidders who meet or exceed the qualification threshold on technical functionality of 70 points will be appointed to be part of the panel.



BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

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

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

2. Bidder's declaration

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

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

Full Name	Identity Number	Name of State institution

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

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.



2.3.1 If so, furnish particulars:

.....
.....

3 DECLARATION

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

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

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 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
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	100

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

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



preferences, in any manner required by the organ of state.

2 DEFINITIONS

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

3 FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

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

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

80/20	or	90/10
$Ps = 80 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)$	or	$Ps = 90 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)$

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

80/20	or	90/10
$Ps = 80 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)$	or	$Ps = 90 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)$

Where:

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



4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
 - (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,
- then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

Table 1: Specific goals for the tender and points claimed are indicated per the table below.
Note to tenderers: 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.	05	
Enterprises which are at least 51% owned by historically disadvantaged youth.	05	

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: