



**KZN GROWTH FUND TRUST (KZNGFA)
REQUEST FOR QUOTATION (RFQ)**

RFQ REFERENCE NUMBER – KZNGFA RFQ 2024 - 20

**APPOINTMENT OF A RECRUITMENT AGENCY TO CONDUCT A PROFESSIONAL SEARCH FOR
THE CHIEF FINANCIAL OFFICER OF THE KZNGFA**

Closing date : **17 October 2024**

Time : 12:00

Submission format : email scm@kzngf.co.za

Name of the respondent:

Late bids will not be accepted

BID DETAILS

Bid title : Request for Quotation for a Recruitment Agency to
Conduct a professional search for the Chief Financial
Officer

Procurement Reference Number : KZNGFA - RFQ 2024/20

Description of Goods & Services : Recruitment Agency Services

Date of RFQ : 30 September 2024

Date of RFQ CLOSING : **17 October 2024**

CONTACT INFORMATION

Any enquiries regarding the bidding procedure may be directed to:

Procurement Officer: Sijabulile Ntshangase

Telephone: 031 372 3720

E-mail: scm@kzngf.co.za

BIDDER'S DETAILS

NAME OF BIDDER.....

POSTAL ADDRESS

STREET ADDRESS

CONTACT PERSON

TELEPHONE NUMBER Code Number

CELL PHONE NUMBER Code Number

FACSIMILE NUMBER Code Number

E-MAIL ADDRESS

Signature of Bidder **Date**

1. PURPOSE

The Kwazulu-Natal Growth Fund Agency (KZNGFA) invites quotations from suitably qualified Recruitment Agency to conduct a professional search for a Chief Financial Officer.

2. BACKGROUND

KwaZulu-Natal Growth Fund Agency (KZNGFA) is an Agency, established and capitalised by the Provincial Government to provide debt and equity. The main objective of the KZNGFA is to provide support for creating and enabling environment for activities that create jobs and accelerate the economic development of KZN whilst promoting Broad Based Black Economic Empowerment (B-BBEE).

2.1 Procurement Philosophy

It is the policy of KZNGFA, when purchasing goods and obtaining services to follow a course of optimum value and efficiency by adopting best purchasing practices in supply chain management, ensuring that open and fair competition has prevailed, with due regard being given to the importance of:

- a) The promotion, development, and support of businesses from disadvantaged communities (small, medium, micro enterprises, as well as established businesses within those communities) in terms of its BEE Policy;
- b) The promotion of national and regional local service providers and agents before considering overseas service providers and;
- c) The development, promotion and support for the moral values that underpin the above, in terms of KZNGFA Business Ethics and Guidelines which requires that all commercial conduct be based on ethical and moral values and sound business practice. This value system governs all commercial behaviour within KZNGFA.

The KZNGFA wishes to engage with service providers who are equally committed to maintain high quality services and better pricing.

3. SCOPE OF SERVICES REQUIRED

The Kwazulu-Natal Growth Fund Agency (KZNGFA) is looking to partner with a company with an excellent track record and extensive experience in executive searches / headhunting and placements and a national network of highly skilled executives, to fill its Chief Financial Officer (CFO) position.

4. DEFINITION OF WORK

4.1 The process in the selection of the preferred service provider will be evaluated as follows:

- 4.1.1 Evaluation of the service provider's proven track record in the provision of a turnkey recruitment process of the successful sourcing and placement of a CFO.
- 4.1.2 Bidders are expected to ensure that all compulsory documents are submitted. Failure to submit compulsory documents will automatically disqualify the bid offer. Bidders will then move to the functionality criteria and be assessed on the functionality as noted in the document.
- 4.1.3 Bids including proposed pricing must be valid for a period of 90 days.
- 4.1.4 Be able to facilitate the completion of assessments (integrity testing, emotional intelligence assessment and assessments that confirm the candidate's ability to deal with complexity.
- 4.1.5 Conduct all the required background checks and verifications which include amongst others criminal checks, fit and proper test, qualifications check and confirmation that information in resume are truthful.

4.2 Bid requirements:

- 4.2.1 The service provider must provide the following:
 - A company profile that highlights 3 or more years' experience, capabilities and methodology in the executive search and successful placement of CFO.
 - A list of 3 (three) contactable references of successful placements at a CFO, clearly stating the performance of the service provider. The reference should not be older than 4 years.
 - A period of 2 weeks will be allocated for the service provider to generate and obtain CVs of suitable candidates.
 - The service provider must present a report on all qualifying candidates' CVs received / obtained, to the Selection Panel on a date, time and place as specified by KZNGFA.

4.3 The service provider must be able to demonstrate prior experience in the execution of the following:

- 4.3.1 Executive headhunting that resulted in the successful placement of candidates at CFO.
- 4.3.2 Generating interest and approaching suitable candidates to apply for the position.
- 4.3.3 This may be through the bidder's various channels, including the use of electronic databases or advertising, all of which will be on the account of the service provider.

4.4 Appointment of Service Provider

- 4.4.1 On completion of evaluation, a service provider will be appointed and confirmed as the service provider to provide the turnkey services as detailed in the document.
- 4.4.2 Once appointed, the service provider should provide the following services within 8 weeks from date of appointment or until the service is no longer necessitated:
 - The service provider must ensure that they understand the requirements of the position (job analysis) and the candidate profile the KZNGFA would like to attract;
 - Sourcing – attracting and encouraging candidates to apply for the position.
 - Presenting a longlist and shortlist – after thorough screening the service provider, will present to the KZNGFA's the longlist and shortlist of candidates who are likely to contribute significantly to the KZNGFA's objectives;
 - Ascertain shortlisted candidates' salary expectations for presentation to the Selection Panel.
 - Manage the process of competency-based interviews with shortlisted candidates in consultation with the Selection Panel.
 - Prepare and issue interview packs to the Selection Panel at the interviews.
 - Conduct comprehensive competency and behavioural assessments of nominated candidates and present results / reports to the Selection Panel.
 - Conduct probity checks on shortlisted candidates (credit checks, criminal record checks, ID Verification checks, qualification checks, tax compliance checks with SARS), including risk profiles (including social media) on headhunted candidates and present results / reports to the Selection Panel.
 - Manage feedback to shortlisted candidates on the outcome of interviews.
 - Provide an electronic catalogue of all meetings and/or discussions relative to the project including taking minutes.
 - Attend status meetings with KZNGFA as and when required and provide written reports on progress of project.
 - Present the offer and employment contract to the preferred candidate and facilitate the signing thereof as mandated by KZNGFA.

- The service provider will work closely with the KZNGFA for the period of the contract and will be responsible to provide services as outlined in this document.
- Standard timelines for headhunting – the following timelines are expected by the KZNGFA:

TASK	MILESTONE/ DELIVERABLE	TIMELINES
<ul style="list-style-type: none"> • Executive/Scarce skill search 	As per agreed project timelines and milestones: <ul style="list-style-type: none"> • Full search; • Identification and present appropriately experienced candidates who are likely to contribute significantly to meeting the KZNGFA's objectives; and • Interview and evaluate potential candidates, including any internal candidates and those that may be identified by the KZNGFA or from other sources. 	Week 1 – 4
<ul style="list-style-type: none"> • Long- and short-listing of potential candidates 	<ul style="list-style-type: none"> • Submit long-list for approval by KZNGFA; • Short-list suitable candidates; and • Verifications and background checks on the shortlist, before any interviews are scheduled. 	Week 4 - 6
<ul style="list-style-type: none"> • Final selection of candidates 	<ul style="list-style-type: none"> • Support to KZNGFA in final selection of candidates. 	Week 7 - 8

5. SPECIFIC CONDITIONS

- 5.1 The successful bidder must be able to work both on-site and offsite via MS Teams as and when required by the Selection Panel.
- 5.2 During the duration of the assignment, the service provider and its assigned personnel shall avail themselves for the provision of mandated services to KZNGFA.
- 5.3 In providing services to KZNGFA, the service provider and its assigned personnel shall ensure, to the best of its reasonable endeavours, to exhibit the highest professional standards and exercise due care, skill, and competence to ensure that the services provided is to the complete satisfaction of KZNGFA, and in accordance with the agreed upon mandate and any applicable legislation.
- 5.4 The service provider shall render the services in a proper and timely manner.
- 5.5 All reports and documents prepared during the assignment shall be treated as the property of KZNGFA.
- 5.6 Reports / documents or any part, therefore, cannot be sold, used and reproduced in any manner without the prior written approval of KZNGFA.

6. AWARD OF THE RFP

KZNGFA is not obliged to accept and award this request for quotation to the lowest bidder or any other bidder.

7. EVALUATION PROCESS AND CRITERIA

Selection will be conducted over three stages as detailed below:

- Stage 1 – Compliance with minimum requirements
- Stage 2 – Price and Specific Goals

7.1 STAGE 1 – COMPLIANCE WITH MINIMUM REQUIREMENTS

7.1 All proposals must be completed and accompanied by:

- 7.1.1 Company Profile
- 7.1.2 Evidence of registration on the National Treasury Central Supplier Database (or proof of registration)
- 7.1.3 Tax Compliance Status Pin
- 7.1.4 Provide three (03) written letters of contactable references for similar work performed. Letters must not be older than four (04) years.

All bids duly lodged as specified in this RFP will be examined to determine compliance with the minimum requirements and conditions. Failure to submit minimum requirements documents will disqualify the service provider from proceeding to the next evaluation stage.

7.2 STAGE 2 – FUNCTIONALITY EVALUATION

Scores will be tabulated to 100 points. Respondents must score 70 points and over to be assessed on their financial offer and preference score.

The allocation of points for the evaluation of quality/functionality is set out in below:

FUNCTIONAL EVALUATION CRITERIA	Weight
<p>Previous Experience</p> <p>Bidders must demonstrate experience in having provided work of a similar nature, by means of a portfolio made up of up to 5 (five) similar projects that have recently been completed or are currently in progress. Annexure A must be completed</p> <ul style="list-style-type: none">• Less than 3 years' experience, capabilities and methodology in the executive search and placement of CEOs = 0 points• More than 3 but less than 5 years' experience, capabilities and methodology in the executive search and placement of CEOs = 10 points• More than 5 but less than 10 years' experience, capabilities and methodology in the executive search and placement of CEOs = 20 points• More than 10 years' experience, capabilities and methodology in the executive search and placement of CEOs = 30 points	30

<p>Reference Letters</p> <p>References of previous successful headhunting work done</p> <ul style="list-style-type: none"> • Less than 3 references of successful placements at a CFO = 0 points • More than 3 references of successful placements at a CFO = 10 points • More than 3 but less than 5 references of successful placements at a CFO = 20 points • More than 5 references of successful placements preferably at a CFO = 30 points <p>Letters must be on company letterhead, signed, and dated. Letters must not be older than 4 years.</p>	<p>30</p>
<p>Methodology and approach</p> <p>Project execution plan, methodology and approach.</p> <ul style="list-style-type: none"> • No project plan = 0 points • A project plan on the timeframes and deliverables with durations of each milestone =20 points • An in-depth, sequential, and pragmatic project plan on the deliverables with duration of each milestone =40 points 	<p>40</p>
<p>Total points allocation</p>	<p>100</p>

Note: Failure to obtain the minimum of 70 out of 100 on functionality will result in disqualification from further evaluation.

7.3 STAGE 2 - PRICE AND SPECIFIC GOALS

7.3.1 Proposals will be subject to an evaluation based on an 80/20 - 80 points for price and 20 points for specific goals.

7.3.2 Fixed price is required; price must be inclusive of VAT and all costs relating to disbursements and accommodation. See **Annexure A**

Evaluation	Maximum points to be awarded
Relative competitiveness of the price	80
Specific Goals (see the below table)	20
Total Price and B-BBEE Points	100

SPECIFIC GOALS TABLE

SPECIFIC GOAL	POINTS	
Black Ownership	51% - 100 %	10
	30% - 50%	6
	5% - 29%	4
	0% - 4%	0
Black Women Ownership	51% - 100 %	4
	30% - 50%	2
	5% - 29%	1
	0% - 4%	0
Black Youth Ownership	30% - 100 %	3
	5% - 29%	2
	0% - 4%	0
Disability	30% - 100 %	3
	5% - 29%	2
	0% - 4%	0
TOTAL POINTS	20	

The following may be used as proof for claiming preference points.

- BBBEE Certificate or BBBEE Affidavit
- CSD Report
- ID Documents of the owners of the company
- Municipal Account or Lease Agreement
- Doctors Certificate / disability database from relevant institutions (for more research)

8. THE INFORMATION REQUIRED

You are and required to provide the KZNGFA with a proposal, by **no later than 12:00pm on 17 October 2024**

9. SUBMISSION DETAILS

- Submissions must be emailed to scm@kzngf.co.za attention Nicolette Napier by no later than the stipulated time above.
- For queries, you can contact Ms. Tshidi Ikaneng at scm@kzngf.co.za during business hours of 8:00am to 4:30pm, Monday to Friday on 031 372 3720.

Approved by



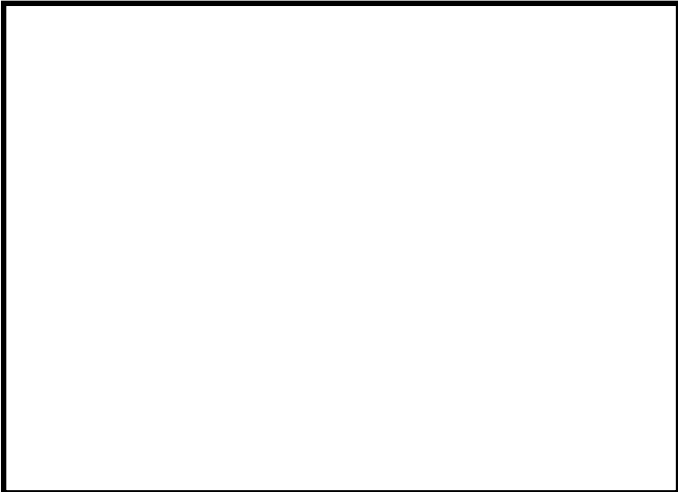
Tshidi Ikaneng
Acting Chief Executive Officer

NAME OF BIDDER: _____

OFFER TO BE VALID FOR 90 DAYS FROM THE CLOSING DATE OF RFQ.

Number	Description	Price
1.	Chief Financial Officer (% of Gross Annual Salary)	_____ %
2.	Background Checks (per candidate)	
3.	Assessments (per candidate)	
Sub-total (Line 2 and 3)		
VAT@ 15%		
Grand Total (Line 2 and 3)		

Tenderers signature.....



COMPANY STAMP

**PART A
INVITATION TO BID**

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)					
BID NUMBER:	KZNGFA RFQ 2024- 20	CLOSING DATE:	17 October 2024	CLOSING TIME:	12pm
DESCRIPTION	APPOINTMENT OF A RECRUITMENT AGENCY				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
Via email to: scm@kzngf.co.za					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Sijabulile Ntshangase		CONTACT PERSON	Thulisile Nxumalo	
TELEPHONE NUMBER			TELEPHONE NUMBER		
FACSIMILE NUMBER			FACSIMILE NUMBER		
E-MAIL ADDRESS	scm@kzngf.co.za		E-MAIL ADDRESS	scm@kzngf.co.za	
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] <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]					
1 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]		2 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:
<p>1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.</p> <p>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.</p> <p>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.</p> <p>1.4. THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).</p>
2. TAX COMPLIANCE REQUIREMENTS
<p>2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.</p> <p>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.</p> <p>2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.</p> <p>2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.</p> <p>2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.</p> <p>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.</p> <p>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."</p>

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

SIGNATURE OF BIDDER:

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

DATE:

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

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

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

2. Bidder's declaration

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

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

Full Name	Identity Number	Name of State institution

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

2.2.1 If so, furnish particulars:

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

2.3.1 If so, furnish particulars:

¹ the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

3 DECLARATION

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

- 3.1 I have read, and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or 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.

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

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.

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**

(delete whichever is not applicable for this tender).

- ~~a) The applicable preference point system for this tender is the 90/10 preference point system.~~
- b) The applicable preference point system for this tender is the 80/20 preference point system.
- ~~c) Either the 90/10 or 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:

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

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:

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

$$P_s = 80 \left(1 + \frac{P_t - P_{max}}{P_{max}} \right) \text{ or } P_s = 90 \left(1 + \frac{P_t - P_{max}}{P_{max}} \right)$$

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 organs of state: Where either the 90/10 or 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.)

The specific goals allocated points in terms of this tender	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)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Black Ownership	/	10.00	/	
Black Women Owned		4.00		
People With Disabilities		3.00		
Black Youth Owned		3.00		

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:

