

RFQ NUMBER	RFQ/MICT/73/2026
RFQ DESCRIPTION	APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT A STUDY ON BARRIERS TO EMPLOYER PARTICIPATION IN THE WSP/ATR SUBMISSION PROCESS: CHALLENGES, PERCEPTIONS AND POLICY IMPLICATIONS
RFQ ISSUE DATE	13 October 2026
COMPULSORY BRIEFING SESSION	N/A
CLOSING DATE & TIME	23 October 2026 @ 11:00 AM South African Time, RFQ submitted after the stipulated closing date and time will not be considered.
LOCATION FOR SUBMISSIONS	<u>rfqs@mict.org.za</u>
NO: OF DOCUMENTS	1 SOFT COPY

For queries, please contact 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

Request For 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
CSD Central Supplier Database (CSD) Registration Report		
Pricing Schedule		
Valid Tax Clearance Certificate(s) and/or proof of application endorsed by SARS and/or SARS-issued verification pin		
SBD 4 – Bidder's Disclosure		
SBD 6.1 - Preferential Procurement Claim Form		
Certified Copy of director(s) ID(s) not older than six (06) months		
CIPC Document		
Shareholding Certificate		
Bidder's eligibility: Form A		

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

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.

FORM A: BIDDER'S ELIGIBILITY FORM

Name of Bidder:

RFQ 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: _____

REQUIREMENT DESCRIPTION: APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT A STUDY ON BARRIERS TO EMPLOYER PARTICIPATION IN THE WSP/ATR SUBMISSION PROCESS: CHALLENGES, PERCEPTIONS AND POLICY IMPLICATIONS**1. INTRODUCTION**

The Media, Information and Communication Technologies Sector Education and Training Authority (MICT SETA) is a public entity established in terms of Section 9(1) of the Skills Development Act (Act No. 97 of 1998). 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.

In fulfilling its mandate, the MICT SETA supports the objectives of the National Skills Development Plan (NSDP) 2030 and contributes to broader national priorities, including those outlined in the National Development Plan (NDP) 2030. The MICT SETA serves employers and stakeholders across the Advertising, Film and Electronic Media, Electronics, Information Technology and Telecommunications sub-sectors, with the aim of promoting relevant, inclusive and responsive skills development interventions.

2. BACKGROUND

The Workplace Skills Plan (WSP) and Annual Training Report (ATR) submission process is a key source of labour market information for the MICT SETA. Through these submissions, employers provide information on workforce profiles, skills needs, training priorities and skills development activities, which contributes to the development of sector skills intelligence and informs the Sector Skills Plan (SSP), skills priorities and related interventions.

In terms of the Skills Development Levies Act, No. 9 of 1999 (SDLA), levy-paying employers may claim Mandatory Grants through the submission of compliant WSPs and ATRs. The process therefore provides value to both the skills development system, through improved sector skills intelligence, and employers, through support for workplace skills development planning and access to grant funding.

Despite the importance of the WSP/ATR process, employer participation and submission rates are a challenge within the MICT sector. Limited participation affects the availability of reliable and representative data required for effective skills planning and may constrain the MICT SETA's ability to accurately identify skills gaps, monitor workforce trends and design targeted skills development interventions.

The factors contributing to low or inconsistent employer participation are not fully understood. These may include administrative challenges, capacity constraints, perceptions regarding the value of the process, challenges experienced by Skills Development Facilitators (SDFs), and other sector-specific barriers.

The MICT SETA therefore seeks to appoint a service provider to conduct a study to investigate barriers to employer participation in the WSP/ATR submission process, understand employer experiences and perceptions, and develop evidence-based recommendations to improve participation, data quality and the effectiveness of the skills planning process.

3. PROBLEM STATEMENT

The MICT SETA relies on employer participation in the WSP/ATR submission process to obtain reliable information on workforce skills needs, training priorities and skills development trends within the sector. These submissions support the MICT SETA's ability to undertake effective skills planning, inform strategic interventions and allocate resources towards identified skills priorities.

Despite the importance of the WSP/ATR process, employer participation remains a challenge. As of 2026, the MICT sector comprises approximately 31 826 registered employers, of which 8 905 are levy-paying entities. For the 2026/2027 reporting period, only 1 976 employers submitted WSP/ATR data. Although this represents the highest submission rate recorded over the past five years, participation remains limited relative to the number of registered and levy-paying employers.

Low participation in the WSP/ATR process affects the availability and representativeness of sector skills data, which may limit the MICT SETA's ability to accurately assess employer skills needs, identify emerging skills priorities, and design targeted skills development interventions.

While several potential factors may contribute to low submission rates, including administrative requirements, limited awareness of the value of the process, capacity constraints, challenges experienced by SDFs, and challenges relating to the accessibility, functionality, and usability of the MICT SETA Integrated Learner Management System (ILMS) used for WSP/ATR submissions, there is limited empirical evidence on the extent to which these factors influence employer participation within the MICT sector. Without a clear understanding of employer experiences, perceptions, and barriers, interventions to improve participation risk being based on assumptions rather than evidence.

A comprehensive study is therefore required to investigate the factors influencing employer participation in the WSP/ATR submission process, assess employer experiences and perceptions, and develop evidence-based recommendations to improve participation, strengthen the quality of sector skills intelligence, and enhance the effectiveness of skills planning and grant utilisation within the MICT sector.

4. PURPOSE OF THE STUDY

The purpose of this study is to investigate the key challenges, perceptions, and factors influencing employer participation in the WSP/ATR submission process. The study aims to identify the underlying reasons for low submission rates, assess employer awareness and perceptions regarding the value and benefits of participating in the process, and evaluate factors influencing employer engagement, including the role of the MICT SETA and the ILMS platform.

5. STUDY OBJECTIVES

The study aims to address the following related objectives:

- 5.1. Assess employers' awareness, understanding and experiences of the WSP/ATR submission process, including communication, guidance and support received from the MICT SETA.
- 5.2. Evaluate employers' perceptions of the value and benefits of WSP/ATR participation, including access to Mandatory Grants, contribution to sector skills planning, and potential benefits relating to skills development and transformation objectives.
- 5.3. Assess employers' experiences of the administrative requirements associated with WSP/ATR submissions, including the accessibility, functionality and usability of the ILMS.
- 5.4. Identify and analyse the key barriers and enabling factors influencing employer participation, including non-submission, late submission, incomplete submissions and the quality of information provided.
- 5.5. Examine variations in WSP/ATR participation, experiences and challenges across MICT sub-sectors, employer categories and company sizes.
- 5.6. Assess the role of the MICT SETA, SDFs and existing support mechanisms in facilitating employer participation and improving submission compliance.
- 5.7. Benchmark WSP/ATR submission trends and participation patterns across SETAs over five years to identify broader trends, challenges and potential lessons for improving employer engagement.
- 5.8. Develop evidence-based recommendations to strengthen employer participation, improve the quality and reliability of WSP/ATR data, optimise the ILMS for WSP/ATR submissions, streamline processes and enhance sector skills planning outcomes.

6. STUDY QUESTIONS

The study should address the following key research questions:

- 6.1. What are employers' levels of awareness, understanding and experience of the WSP/ATR submission process, including the support and guidance provided by the MICT SETA?
- 6.2. How do employers perceive the value and benefits of WSP/ATR participation, including access to Mandatory Grants, contribution to skills planning and skills development outcomes?
- 6.3. What administrative, process and system-related challenges, including challenges associated with the ILMS, influence employer participation and the quality of WSP/ATR submissions?
- 6.4. What are the key barriers and enabling factors affecting employer participation, including non-submission, late submission, incomplete submissions and data quality?
- 6.5. How do participation levels, experiences and challenges differ across MICT sub-sectors, employer categories and company sizes?
- 6.6. How effective are the current support mechanisms provided by the MICT SETA, SDFs and other stakeholders in facilitating participation?
- 6.7. How do WSP/ATR submission trends within the MICT SETA compare with other SETAs, and what lessons can be identified to improve employer engagement?
- 6.8. What interventions and recommendations can strengthen employer participation, improve WSP/ATR data quality, optimise the ILMS and enhance sector skills planning?

7. SCOPE OF WORK

- 7.1. Conduct a comprehensive review of relevant literature, MICT SETA research, legislative and policy frameworks, and available WSP/ATR data to establish the context for the study.
- 7.2. In collaboration with the MICT SETA team, identify stakeholders to participate in the study, ensuring alignment with the research objectives.

NB: All MICT SETA-registered employers should be considered, including both employers that submit WSP/ATR data and those that do not.

- 7.3. Develop a fit-for-purpose research methodology and analytical framework, including an appropriate sampling strategy, stakeholder engagement approach, and qualitative and quantitative research instruments to address the study objectives.
- 7.4. Develop research instruments, including questionnaires/surveys and interview guides, tailored to the specific stakeholder groups identified for participation in the study.
- 7.5. Analyse WSP/ATR participation trends, employer experiences, perceptions, administrative challenges, and barriers to participation, including variations across MICT sub-sectors, employer categories, and enterprise size.
- 7.6. Identify and analyse the key behavioural, organisational, administrative, operational, regulatory and system-related barriers, as well as enabling factors, influencing employer participation in the WSP/ATR process, including factors contributing to non-submission, late submission, incomplete submissions, and poor-quality information.
- 7.7. Assess the effectiveness of existing MICT SETA communication, support mechanisms, SDFs, and the LMS, including its accessibility, functionality, user-friendliness and usability, and identify opportunities to enhance the system.
- 7.8. Benchmark WSP/ATR participation trends, employer support practices, and submission processes across SETAs to identify good practices and lessons for improving employer participation.
- 7.9. Analyse the policy, institutional, and operational implications of the study findings for improving employer participation, strengthening the quality of WSP/ATR data, and enhancing sector skills planning.
- 7.10. Facilitate stakeholder engagement and validation processes to test the findings, refine recommendations, and ensure alignment with employers, SDFs, and other relevant partners.
- 7.11. Develop practical, evidence-based recommendations and an implementation framework outlining priority actions, institutional responsibilities, and monitoring considerations.
- 7.12. Produce a comprehensive research report and present the draft and final findings and recommendations to MICT SETA management, governance structures, and other designated stakeholders.

8. DELIVERABLES AND OUTPUTS

- 8.1. An inception report developed in consultation with MICT SETA, outlining the refined research approach, project plan, timelines, stakeholder engagement approach, and quality assurance processes.
- 8.2. A comprehensive literature review.
- 8.3. Research instruments and data collection tools, subject to review and approval by MICT SETA.
- 8.4. A draft report presenting the research approach, findings, conclusions, and preliminary recommendations for review by MICT SETA.
- 8.5. A final research report incorporating feedback from MICT SETA and stakeholders, submitted in electronic and hard copy formats. The report should include:
- 8.6. An executive summary (of approximately 5 pages) and
- 8.7. A full report (maximum 60 pages, excluding references and annexures).
- 8.8. Submission of completed research instruments, relevant engagement records, datasets, analytical outputs, and editable versions of value chain maps, models, matrices, and other tools developed through the study to enable future updates and application by MICT SETA.
- 8.9. PowerPoint presentations accompanying key deliverables and presentation of findings and recommendations to MICT SETA management, governance structures, and relevant stakeholders. This should include presentation of findings at MICT SETA Research Conferences.
- 8.10. The final report and associated materials should incorporate appropriate graphical representations, data visualisations, and infographics aligned with MICT SETA branding requirements.
- 8.11. A Research Output Communication Strategy outlining how approved research findings and outputs will be communicated and disseminated to relevant stakeholders.

9. QUALITY AND REPORTING

The appointed service provider will report directly to the Manager: Sector Skills Planning. The Manager: Sector Skills Planning will provide overall oversight of the service and its performance, with the MICT SETA-nominated Project Coordinator responsible for day-to-day coordination, monitoring and quality assurance. The Service Provider's Lead Researcher will be responsible for ensuring the methodological integrity and internal quality of the research outputs and will work in collaboration with the Project Coordinator to address any quality-related matters. All deliverables will be subject to review and approval by MICT SETA.

10. OWNERSHIP RIGHTS

MICT SETA shall be the owner of all data, data sets, reports, documents, research outputs, and any equipment or software procured under this assignment, and this project shall be governed by a formal written contract concluded with the appointed service provider. All documents, reports, and information relating to the assignment must be handed over to MICT SETA before final payment is made.

The service provider shall not sell, publish, use, or otherwise deal with the outputs, or any part thereof, without the prior written consent of MICT SETA. Any use of research or intellectual property owned by MICT SETA without such consent constitutes a contravention of the Intellectual Property Rights from Publicly Financed Research and Development Act (IPR-PFRD Act), specifically Section 4. MICT SETA may secure consents and enter into formal IP transactions to license, assign, or otherwise manage such IP in compliance with the Act.

11. DELIVERABLES TIMELINE OF THE PROJECT

The successful service provider will enter into a contractual agreement with MICT SETA for a period of six (6) months.

12. PRICING SCHEDULE

Name of bidder: _____

RFQ number: _____

Closing date: _____

RFQ 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 Price	Total Cost (Excl. VAT)
	APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT A STUDY ON BARRIERS TO EMPLOYER PARTICIPATION IN THE WSP/ATR SUBMISSION PROCESS: CHALLENGES, PERCEPTIONS AND POLICY IMPLICATIONS			
1.	Inception Report	1	R	R
2.	Literature Review	1	R	R
3.	Data Collection Plan and Instruments	1	R	R
4.	Final Report and Presentation	1	R	R
Sub-Total			R	
VAT@15%			R	
TOTAL PRICE (INCLUDING VAT)			R	

Complete below:

1. Delivery Address: **MICT SETA Head office**
Level 3 West wing, Gallagher House
19 Richards Drive, Halfway House
Midrand
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: _____

13. 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.

RFQs received will be evaluated on functional evaluation criteria, and price and specific goals comparison.

13.1. STAGE 1: FUNCTIONAL EVALUATION CRITERIA

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

Only bidders who meet or exceed the qualification threshold on technical/ functionality evaluation of **70 points** will be evaluated further on price and specific goals.

Note: All bidders achieving less than the set threshold of **70 points** will not move to the next stage of evaluations.

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

FUNCTIONAL CRITERIA		
Category	Description	Maximum Points
METHODOLOGY	The bidder must submit a detailed methodology demonstrating its approach to conducting the study. The methodology should demonstrate an understanding of the Terms of Reference and include: 1. Understanding of the project scope and proposed research methodology. 2. Approach to data collection, including primary and secondary data sources and stakeholder engagement. 3. Sampling approach, including justification of the proposed sample and sampling methodology. 4. Project implementation plan, including key activities, timelines and deliverables. Points on provision of detailed methodology will be allocated as follows: •The bidder submitted a methodology and approach that meets all four (04) elements = 30 points •The bidder submitted a methodology and approach that meets only three (03) elements = 20 points •The bidder submitted a methodology and approach that meets only two (02) elements = 10 points •The bidder submitted a methodology and approach that meets only one (01) elements = 05 points •The bidder did not submit a methodology or submitted a methodology that does not meet the minimum requirements = 0 point	30
PORTFOLIO OF EVIDENCE (Research Report Samples)	The bidder must submit three (3) or more completed research reports for comparable studies undertaken within the past five (5) years. Reports should demonstrate experience in one or more of the following: 1. Skills development, SETA or PSET research; 2. Employer or stakeholder perception/satisfaction studies; 3. Policy implementation or programme evaluation studies; and 4. Service delivery or user experience (UX) assessments in the PSET sector. Points for submission of research report samples will be allocated as follows:	15

	• The bidder submitted three (03) or more research report samples demonstrating experience in one or more of the above elements = 15 Points • The bidder submitted two (02) research report samples demonstrating experience in one or more of the above elements = 10 Points • The bidder submitted one (01) research report samples demonstrating experience in one or more of the above elements = 05 Points • The bidder did not submit research report samples or samples submitted does not demonstrate experience in any of the above elements = 0 Points	
REFERENCE LETTERS	The bidder must submit at least three (03) or more contactable reference letters related to the bidder's experience in conducting research in comparable studies or related field. The reference letters must be from different bidder's clients, fully signed on the client's letterhead, dated, with contactable details, and project description, confirming the successful completion of the comparable studies. Note: Reference letters must be linked to the submitted research report samples and relate to projects completed within the past five (5) years. Points on provision of reference letters of experience in conducting research in comparable studies or related field will be allocated as follows: • The bidder submitted Three (03) signed contactable reference letters from different clients linked to the submitted samples = 10 points • The bidder submitted Two (02) signed contactable reference letters from different clients linked to the submitted samples = 08 points • The bidder submitted One (01) signed contactable reference letter linked to the submitted sample = 05 points • The bidder did not submit reference letters or submitted reference letters that are not linked to the submitted research report samples = 0 point Important: In the event of sub-contracting, the bidder must furnish the above reference letters of the main bidder. MICT reserves the right to contact the references. POs and Appointment letters will not be accepted.	10
QUALITY ASSURANCE PLAN	The bidder must submit a Quality Assurance Plan and Risk Mitigation Plan demonstrating how the quality of the research process and deliverables will be managed throughout the project. The submission should include: 1. Quality assurance procedures, including internal review processes, data quality management and validation of findings. 2. Risk identification and mitigation measures addressing potential risks to the successful delivery of the project and proposed mitigation strategies. Points on submission of a quality assurance plan will be allocated as follows: • The bidder submitted a comprehensive plan covering all two (02) elements = 10 points • The bidder submitted a plan covering only one (01) element = 05 points • The bidder did not submit a quality assurance plan, or plan does not cover any of the elements = 0 points	10
EXPERIENCE AND QUALIFICATIONS OF THE TEAM LEADER	The bidder's proposed team leader indicated as such must have experience in Leading comparable policy, programme evaluation, stakeholder or labour market research and a Master's qualification or higher in Economics, Development Studies, Public Policy, Social Sciences, Research, Statistics or a related field. Team leader's Experience (10 Points)	15

	The bidder's team leader must have at least eight (08) years or more of experience in leading comparable policy, programme evaluation, stakeholder or labour market research. Points on provision of CV of team leader will be allocated as follows: • The bidder submitted CV of the team leader highlighting eight (08) years or more of experience in leading comparable policy, programme evaluation, stakeholder or labour market research = 15 points • The bidder submitted CV of the team leader highlighting seven (07) years of experience in leading comparable policy, programme evaluation, stakeholder or labour market research = 15 points • The bidder submitted CV of the team leader highlighting six (06) years of experience in leading comparable policy, programme evaluation, stakeholder or labour market research = 15 points • The bidder submitted CV of the team leader highlighting five (05) years of experience in leading comparable policy, programme evaluation, stakeholder or labour market research = 15 points • The bidder submitted CV of the team leader highlighting four (04) years or less of experience in leading comparable policy, programme evaluation, stakeholder or labour market research = 0 points Team leader's Qualification (05 Points) The bidder's team leader must have a Master's degree or higher in qualification in Economics, Development Studies, Public Policy, Social Sciences, Research, Statistics or a related field. Points on provision of qualification of the team leader will be allocated as follows: • The bidder submitted a certified copy of a Master's or higher qualification in Economics, Development Studies, Public Policy, Social Sciences, Research, Statistics or a related field = 05 points • The bidder did not submit a certified copy of qualification or submitted a copy of qualification that is not related = 0 Points Certified copy of qualification must not be older than six (06) months.	
EXPERIENCE AND QUALIFICATIONS OF THE RESEARCHER	The bidder's proposed researcher indicated as such must have experience in conducting comparable policy, programme evaluation, stakeholder or labour market research and a bachelor's degree or higher in Economics, Labour Studies, Development Studies, Social Sciences, Statistics, Public Policy, Research Methodology or another relevant field Researcher's Experience (05 Points) The bidder's researcher must have at least three (03) years or more of conducting comparable policy, programme evaluation, stakeholder or labour market research. Points on provision of CV of team leader will be allocated as follows: • The bidder submitted CV of the researcher highlighting three (03) years of experience in conducting comparable policy, programme evaluation, stakeholder or labour market research = 05 points • The bidder submitted CV of the researcher highlighting two (02) years or less of experience in conducting comparable policy, programme evaluation, stakeholder or labour market research = 0 points Researcher's Qualification (05 Points) The bidder's researcher must have a bachelor's degree or higher in Economics, Labour Studies, Development Studies, Social Sciences, Statistics, Public Policy, Research Methodology or another relevant field Points on provision of qualification of the team leader will be allocated as follows: • The bidder submitted a certified copy of a bachelor's degree or higher in Economics, Labour Studies, Development Studies, Social Sciences,	10

	Statistics, Public Policy, Research Methodology or another relevant field = 05 points • The bidder did not submit a certified copy of qualification or submitted a copy of qualification that is not related = 0 Points Certified copy of qualification must not be older than six (06) months.	
EXPERIENCE AND QUALIFICATIONS OF THE DATA ANALYST	The bidder's proposed data analyst indicated as such must have experience in conducting comparable policy, programme evaluation, stakeholder or labour market research as a data analyst and a bachelor's degree or higher in Statistics, Economics, Data Science, Social Sciences, Research Methodology, or another relevant field. Researcher's Experience (05 Points) The bidder's data analyst must have at least three (03) years or more experience in conducting comparable policy, programme evaluation, stakeholder or labour market research as a data analyst. Points on provision of CV of team leader will be allocated as follows: • The bidder submitted CV of the data analyst highlighting three (03) years of experience in conducting comparable policy, programme evaluation, stakeholder or labour market research as a data analyst = 05 points • The bidder submitted CV of the team leader highlighting two (02) years or less of experience in conducting comparable policy, programme evaluation, stakeholder or labour market research as a data analyst = 0 points Researcher's Qualification (05 Points) The bidder's data analyst must have a bachelor's degree or higher in Statistics, Economics, Data Science, Social Sciences, Research Methodology, or another relevant field. Points on provision of qualification of the team leader will be allocated as follows: • The bidder submitted a certified copy of a bachelor's degree or higher in Statistics, Economics, Data Science, Social Sciences, Research Methodology, or another relevant field = 05 points • The bidder did not submit a certified copy of qualification or submitted a copy of qualification that is not related = 0 Points Certified copy of qualification must not be older than six (06) months.	10
TOTAL		100
MINIMUM SCORE		70

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.

13.2. STAGE 2: PRICE AND SPECIFIC GOALS

Only bidder/s or RFQ submissions that have met the requirements of evaluation 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. RFQ will be awarded to the bidder scoring the highest points.

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

Specific Goal Criteria	Points allocation
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
Total	20

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

Bidder must submit the following documents:

- CIPC Documents and a valid share certificate (Indicating % shareholding by each director)
- Certified ID Copies of the company's directors as per CIPC documents. **(certified copies must not be older than six (06) months)**

Failure on the part of a service provider to submit proof or documentation required in terms of this RFQ/Tender (in cases where it a tender) to claim points for specific goals, will be interpreted to mean the preference points for specific goals are not claimed.

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

- 1.1 Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa, 1996 (Constitution), and further expressed in the various applicable legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.
- 1.2 If a person is 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. DECLARATION ON EMPLOYMENT BY ORGAN OF STATE

- 2.1 Is the bidder, or any of the directors / trustees / shareholders / members / partners of the bidder employed by an organ of state, as defined in section 239 of the Constitution?
YES/NO

- 2.2 If YES, furnish particulars of the names, individual identity numbers, in the table below:

Full Name	Identity Number	Name of organ of state

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

- 2.3.1 If so, furnish particulars:

.....

- 2.4 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

- 2.4.1 If so, indicate all companies registered in the CSD in the table below:

Supplier registration number (MAAA)	Status (active/inactive/deleted)

Failure to disclose all CSD-registered active companies linked to all Directors will lead to disqualification.

3 GENERAL DECLARATION

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

I CERTIFY THAT THE ABOVE IS CORRECT.

I ACCEPT THAT THE PROCURING INSTITUTION MAY REJECT THE BID OR TAKE APPROPRIATE ACTION AGAINST ME IF THIS DECLARATION IS FALSE.

.....
Signature

.....
Date

.....
Designation

.....
Name of bidder

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.

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)
Enterprise owned by historically disadvantaged persons.	10	
Enterprise owned by historically disadvantaged women.	05	
Enterprise 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:

.....

.....

.....

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