



REQUEST FOR QUOTATION

RFQ No.:	Contact Person:
BS/2023/ASD0104	Jackie Kwinika
RFQ Issue Date:	Contact Details:
Request for quotation – 25 April 2023	011-805-9661
Closing Date: 8 May 2023 at 11:00	Jackiek@bankseta.org.za
Description of services/products required:	
DISPOSAL OF THE OBSELETE/ BROKEN OFFICE FURNITURE AND EQUIPMENT	

Part A: Request for Quotation Documentation

- ✓ Terms of Reference / Specifications.

Part B: Returnable Documents and Schedules:

- ✓ **Returnable Documents which should accompany the quotation.**
 - BANKSETA will check the tax status of the service provider on the CSD report.
 - CSD Master Registration report.
- ✓ **Returnable Forms which should accompany the quotation**
The forms should be fully completed, signed and dated appropriately (see annexure)
 - SBD 4: Bidders Disclosure.
 - SBD 6.1 (complete the part that is applicable to the BANKSETA Preferential Procurement Policy).

PLEASE NOTE:

- ✓ Supplier should be registered on the National Treasury Central Supplier database.
- ✓ The quotation should be on the supplier's letterhead.
- ✓ Quotations should be in accordance with the specifications, unless otherwise stipulated.
- ✓ Where applicable, the official pricing structure should be used. Should the allocated pricing page / information be insufficient, you may include an additional copy of the price page;
- ✓ Suppliers should complete all the Returnable Schedules and also submit all the Returnable Documents.
- ✓ The supplier should complete the BANKSETA Preferential Procurement Point Document.
- ✓ The quotation must be valid for at least 90 days.

Enquiries with regard to specifications may be directed to:

Name: Jackie Kwinika

Telephone No: 011 805 9661

Email : jackiek@bankseta.org.za

CLOSING DETAILS		
CLOSING DATE	CLOSING TIME	MODE OF SUBMISSION
8 May 2023	11:00	ELECTRONIC PDF SENT TO: JACKIEK@BANKSETA.ORG.ZA COPY SCM@BANKSETA.ORG.ZA

1. BACKGROUND

The Banking Sector Education and Training Authority (BANKSETA) is the SETA for the banking and alternative banking industry. It is a statutory body established through the Skills Development Act of 1998 as amended by the Skills Development Act, 26 of 2011. The BANKSETA seeks to promote skills development within the banking and alternative banking sector.

For further details on the BANKSETA, visit www.bankseta.org.za and refer to the 2021 – 2022 annual report under the Media Center /publications/annual reports section.

<https://www.bankseta.org.za/wp-content/uploads/2021/22/Bankseta-Annual-Report.pdf>

2. SCOPE OF WORK

2.1 The BANKSETA has used items of office furniture and fittings and office equipment for disposal.

2.2 The BANKSETA seeks quotes from companies/ service provider for purchase of these assets voetstoots. The items are damaged or old.

2.3 The service provider must be willing to incur costs for the collection of the obsolete assets from the BANKSETA offices Centurion and 1 Chair in East London.

2.4 Most items have some damage or are old.

2.5 All items will be sold voetstoots/in their current condition. The items may not be in a usable conditions and could be used for parts.

2.6 All items will be sold as one lot and the price quoted should be for everything.

2.7 A non-compulsory inspection section is scheduled for the **2 May 2023 between 9am and 3pm** at the offices below. Kindly email the SCM Specialists using the details below to indicate that you will attend the inspection: Jackie Kwinika - jackiek@bankseta.org.za (that BANKSETA will not be responsible for misquotation of items on the list)

2.8 The BANKSETA physical address:

Province	Physical Address
GAUTENG	Eco Origin Office Park, Block C2, 349 Witch-hazel Avenue, Eco Park Estate, Highveld, Centurion, 0144 Please use gate 1

3. MINIMUM REQUIREMENTS

3.1 There are no minimum requirements.

The service provider is expected to remove the items from BANKSETA premises and settle the quoted amount within one week of conclusion of the transactions.

4. DURATION

This is a once off transaction.

5. PRICE AND PREFERENCE POINTS EVALUATION

The tender will be evaluated using the following: price and preference points using BANKSETA Goals for tenders to generate income or to dispose of or to lease assets
80/20 PRICEPREFERENCE POINT SYSTEMS

Points for Price	Preference Points Utilising BANKSETA Goals	Total Points
80	20	100

A maximum of 80 points is allocated for price using the following formula:

Where

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

6. ITEMS TO BE DISPOSED OF:

The quotation must be valid for at least 90 days.

OFFICE FURNITURE

No	Date of purchase	Description of assets	Location	Asset Condition
1	1-Apr-2000	Chair swivel Black	East London	Damaged- can be fixed for usage
2	4-Mar-2002	Frame - Thomas Mikel	Centurion	Damaged- can be fixed for usage
3	25-Nov-2008	Flick chair black frame upholstered seat	Centurion	Damaged- can be fixed for usage
4	25-Nov-2008	Flick chair black frame upholstered seat	Centurion	Damaged- can be fixed for usage
5	25-Nov-2008	Flick chair black frame upholstered seat	Centurion	Damaged- can be fixed for usage
6	25-Nov-2008	Flick chair black frame upholstered seat	Centurion	Damaged- can be fixed for usage
7	25-Nov-2008	Flick chair black frame upholstered seat	Centurion	Damaged- can be fixed for usage
8	25-Nov-2008	Flick chair black frame upholstered seat	Centurion	Damaged- can be fixed for usage
9	25-Nov-2008	Flick chair black frame upholstered seat	Centurion	Damaged- can be fixed for usage
10	25-Nov-2008	Flick chair black frame upholstered seat	Centurion	Damaged- can be fixed for usage
11	25-Nov-2008	Flick chair black frame upholstered seat	Centurion	Damaged- can be fixed for usage
12	25-Nov-2008	Flick chair black frame upholstered seat	Centurion	Damaged- can be fixed for usage
13	25-Nov-2008	Flick chair black frame upholstered seat	Centurion	Damaged- can be fixed for usage
14	25-Nov-2008	Flick chair black frame upholstered seat	Centurion	Damaged- can be fixed for usage
15	25-Nov-2008	Flick chair black frame upholstered seat	Centurion	Damaged- can be fixed for usage
16	25-Nov-2008	Flick chair black frame upholstered seat	Centurion	Damaged- can be fixed for usage
17	25-Nov-2008	Flick chair black frame upholstered seat	Centurion	Damaged- can be fixed for usage
18	25-Nov-2008	Flick chair black frame upholstered seat	Centurion	Damaged- can be fixed for usage
19	25-Nov-2008	Flick chair black frame upholstered seat	Centurion	Damaged- can be fixed for usage
20	25-Nov-2008	Flick chair black frame upholstered seat	Centurion	Damaged- can be fixed for usage
21	25-Nov-2008	Flick chair black frame upholstered seat	Centurion	Damaged- can be fixed for usage
22	25-Nov-2008	Flick chair black frame upholstered seat	Centurion	Damaged- can be fixed for usage

23	25-Nov-2008	Flick chair black frame upholstered seat	Centurion	Damaged- can be fixed for usage
24	25-Nov-2008	Flick chair black frame upholstered seat	Centurion	Damaged- can be fixed for usage
25	25-Nov-2008	Flick chair black frame upholstered seat	Centurion	Damaged- can be fixed for usage
26	25-Nov-2008	Flick chair black frame upholstered seat	Centurion	Damaged- can be fixed for usage
27	25-Nov-2008	Flick chair black frame upholstered seat	Centurion	Damaged- can be fixed for usage
28	donation	Glass table	Centurion	Damaged- can be fixed for usage
29		Painting	Centurion	Damaged- can be fixed for usage
30	28-Mar-2012	Cherry postform pole legs	Centurion	Damaged -for parts purpose
31	28-Mar-2012	Cherry veneer & glass coffee table	Centurion	Damaged- can be fixed for usage
32	26-Apr-2012	Painting (Cost included in renovations cost)	Centurion	Damaged- can be fixed for usage
33	27-Jul-2015	Diana visitors chair - chrome sleigh base	Centurion	Damaged- can be fixed for usage
34	25-Aug-2016	ACTA Visitors Chair	Centurion	Damaged- can be fixed for usage
35	25-Aug-2016	Canteen Table	Centurion	Damaged -for parts purpose
36	25-Aug-2016	Canteen Table	Centurion	Damaged -for parts purpose
37	25-Aug-2016	ACTA Visitors Chair	Centurion	Damaged- can be fixed for usage
38	25-Aug-2016	ACTA Visitors Chair	Centurion	Damaged- can be fixed for usage
39	25-Aug-2016	ACTA High Back Chair	Centurion	Damaged- can be fixed for usage
40	25-Aug-2016	ACTA High Back Chair	Centurion	Damaged- can be fixed for usage
41	25-Aug-2016	ACTA High Back Chair	Centurion	Damaged- can be fixed for usage
42	25-Aug-2016	ACTA Visitors Chair	Centurion	Damaged- can be fixed for usage
43	25-Aug-2016	ACTA Visitors Chair	Centurion	Damaged- can be fixed for usage
44	25-Aug-2016	ACTA High Back Chair	Centurion	Damaged- can be fixed for usage
45	25-Aug-2016	ACTA Visitors Chair	Centurion	Damaged- can be fixed for usage
46	25-Aug-2016	ACTA Visitors Chair	Centurion	Damaged- can be fixed for usage
47	3-Mar-2015	Executive chair	Centurion	Damaged- can be fixed for usage

OFFICE EQUIPMENT

No.	Date Purchased	Description of assets	Asset Condition
1	11-Sep-08	KEMA 15KVA UPS	Damaged- for parts purpose
2	10-Sep-17	Telefunken 32 HD + Bracket	Damaged- can be fixed for usage
3	15-Feb-10	Samsung SCX-6322DN Printer	Damaged -for parts purpose
4	19-Jul-10	Toshiba E Studio	Damaged- for parts purpose
5	12-Nov-10	Infocus IN3114 Projector - SN BEKB03500275	Damaged- for parts purpose
6	19-Apr-11	UPS 200RMI2U 16A 220-240 V	Damaged- for parts purpose
7	19-Jul-13	JVC 65" LED Screen (SN 00920120102) and Bracket	Damaged- can be fixed for usage
8	19-Jul-13	JVC RX5060 AV Amplifier Surround SN096C0073	Damaged- can be fixed for usage
9	19-Jul-13	JBL Control 23 Speaker 50-80w wall/ceiling	Damaged- can be fixed for usage
10	19-Jul-13	Polycom HDX 7000*720 HD Codec (SN 821309402B52CN; BASE BOX SN 821309402B50CN; CAMERA	Damaged- can be fixed for usage
11	28-Nov-13	Phillips Digital Voice Recorder	Damaged- for parts purpose
12	31-Mar-15	PABX System	Damaged- for parts purpose

7. PREFERENCE POINTS UTILISING BANKSETA GOALS

In terms of Gazette 2721, the BANKETA has allocated preference points to be awarded to tenderers who meet certain BANKSETA Goals as follows:

No	Specific Goals	80/20 Preference Point system
		Transactions with no local content requirement set by legislation

1.	Empowerment of black persons- Ownership and Active Management by black persons – 51% threshold as explained below	6
2.	Promotion of Local production and Delivery by South Africans – 100% threshold as explained below	6
3.	Empowerment of Women - Women Ownership and management - Threshold 50% as explained below	2
4.	Youth Empowerment Youth Ownership and management – 33% Threshold as explained below	2
5.	Empowerment of Persons With Disabilities - Ownership and Management or Employment of People with Disabilities – 20% threshold for Ownership and Management and 10% threshold for Employment of Persons with Disabilities as explained below	2
6.	Promotion of small and medium businesses, co-operatives and non-governmental institutions in all areas- rural and urban areas – as explained below	2
	Total Points allocated towards specific goals	20

The Service provider should complete the preference point bidding form attached.

8. EXPLANATIONS

- 7.1 Black persons are as defined in Broad based black economic empowerment Act (B-BBEE) which currently means Africans, Coloureds and Indians:
- (a) who are citizens of the Republic of South Africa by birth or decent; or
 - (b) who became citizens of the Republic of South Africa by naturalisation –

(i) before 27 April 1994.

(ii) on or after 27 April 1994 and who would have been entitled to acquire citizenship by naturalisation prior to that date.

- 7.2 Black Person Ownership points will be awarded to a Tenderer who have 51% or more black ownership who are actively involved in the day-to-day activities of the company or entity. The shareholding will determine the ownership. The position and role that black owners play in the company should be stated.
- 7.3 Promotion of Local Production and Services Delivered by South Africans
The goods supplied should be 100% manufactured or assembled in South Africa from 100% local materials and any services supplied should 100% utilising South African citizens.
- 7.4 Women ownership points will be awarded to a Tenderer who have 50% or more women ownership, who are actively involved in the day-to-day activities of the company or enterprise and are South African citizens. The position and role that women owners play in the company should be stated.
- 7.5 Youth ownership points will be awarded to a Tenderer who have 33% or more youth ownership being persons 35 years and below, determined at the date of tender/ RFQ closing. Youth ownership will be determined based on the shareholding of the members who are defined as youth and are South African citizens.
- 7.6 Persons with Disability Ownership points will be awarded to a Tenderer who have 20% or more shareholding by South African citizen persons with disability who are actively involved in the day-to-day activities of the company or entity are **OR** to tenderers who employ 10% or more South African persons with disability on a permanent basis. Disability ownership will be determined by the shareholding of the enterprise owned by such a South African citizen person with disability who are actively involved in the day-to-day activities of the company or enterprise OR by enterprises whose permanent staff complement consists of 10% or more South African citizen persons with disabilities. The disabilities need to be legally verifiable for points to be claimed.
An entity may only claim once under this category regardless of if it qualifies under both South African citizen persons with disabilities ownership and employment of South African persons with disability.
- 7.7 Small and medium business includes all South African businesses, co-operatives and non-governmental organisations with annual turnover up to R10 million or alternatively, these entities are recently incorporated, have been operating for less than one year and are projected to have annual turnover of less than R10 million in the first year. The ownership of

small and medium business, co-operatives or non-governmental organisations should be 100% South African citizens (or entities owned 100% by South Africa citizens).

- 7.8 An entity may claim points based on the same shareholding or persons in more than one category. For example black female disabled shareholders under 35 who is a SA citizen may lead a business to claim points under Empowerment of women, youth empowerment and empowerment of persons with disabilities.

7.9 False Information from Bidders

Should the BANKSETA ascertain that any bidder has submitted any false information, the BANKSETA may disqualify the bidder/service provider, cancel any award without prejudice to any other remedies available to BANKSETA and report the service provider to National Treasury.

The bidder/service provider will be given an opportunity to give reasons why BANKSETA should not take actions detailed above where false information has been submitted.

9. COMPLIANCE STATUS

- a. The BANKSETA before making an award, shall check on the Central Supplier Database CSD whether.
- b. The bidder's tax status is compliant and
- c. The bidder or any of its directors are not listed / indicated as restricted from doing business with the public sector, and/or are person(s) prohibited/ its directors are not employees of the state and have no conflict of interest in the BANKSETA or have written authority to do work with the state as per the legislation.
- d. The BANKSETA will not award to service providers who do not comply with the above.

10. RFQ CONDITIONS

- a. The BANKSETA reserves the right to withdraw or amend terms of reference by notice in writing by advertising in the media in which the RFQ was originally advertised prior to the closing date.
- b. BANKSETA reserves the right not to award this RFQ and the right to reduce the quantities awarded.
- c. BANKSETA reserves the right to verify the information submitted and request for further information during evaluation of the proposal.
- d. BANKSETA shall not be liable for any direct, indirect, consequential or other losses or damages including loss of profit that may be incurred by any person including, but not limited to, an Applicant, Short Listed Applicant or Successful Applicant, or any director, officer or associated company thereof, as a result of any

reliance on or use of information supplied in response to this RFQ or as a result of the RFQ process contemplated in this RFQ document.

- e. BANKSETA makes no representations, undertakings or warranties whatsoever to any person in respect of the RFQ or any information contained in the RFQ.
- f. This RFQ is confidential and proprietary to BANKSETA and may not be used, reused, copied or distributed for any purpose, other than in relation to the RFQ process, without BANKSETA's prior written consent.
- g. POPIA - The Protection of Personal Information Act, ("POPIA") includes the right to protection against unlawful collection, retention, dissemination and use of personal information. BANKSETA complies with POPIA in collecting, processing and distributing of Personal Information, which include cooperation with the Regulator as provided for in the act.

11. REVIEW PROCESS

- a. In order to evaluate and adjudicate proposals effectively, it is imperative that applicants submit responsive applications. To ensure an application will be regarded as responsive it is imperative to comply with all conditions pertaining to the application and to complete all the mandatory fields and questionnaires.
- b. All applications duly lodged as per the submission requirements will be evaluated in accordance with the stipulated minimum requirement.
- c. The validity period of proposals is at least **90 days** after closing.

12. QUOTATION/PRICING

- The quotation should be on the service provider/bidder's letterhead.
- The pricing should show VAT separately.
- No pricing adjustment will be allowed after closing date.

BANKSETA PREFERENCE POINTS CLAIM DOCUMENT

1.1 The service provider is requested to complete the form below accurately and fully to show the areas where it wishes to claim preference points.

It is the service providers responsibility to ensure that the form is accurately and fully completed.

1.2 For shortlisted service providers, BANKSETA may request additional information and evidence to support the preference points claimed.

1.3 An entity may claim points based on the same shareholding or persons in more than one category. For example, black female disabled shareholders under 35 who is a SA citizen may lead a business to claim points under Empowerment of women, youth empowerment and empowerment of persons with disabilities.

The BANKSETA will allocate preference points as follows:

No	Specific Goals	80/20 Preference Point system
		Transactions with no local content requirement set by legislation
7.	Empowerment of black persons- Ownership and Active Management by black persons – 51% threshold as explained below	6
8.	Promotion of Local production and Delivery by South Africans – 100% threshold as explained below	6
9.	Empowerment of Women - Women Ownership and management - Threshold 50% as explained below	2
10	Youth Empowerment Youth Ownership and management – 33% Threshold as explained below	2
11	Empowerment of Persons With Disabilities - Ownership and Management or Employment of People with Disabilities – 20% threshold for Ownership and Management and 10% threshold	2

	for Employment of Persons with Disabilities as explained below	
12	Promotion of small and medium businesses, co-operatives and non-governmental institutions in all areas- rural and urban areas – as explained below	2
	Total Points allocated towards specific goals	20

1.4 Empowerment of black persons- Ownership and Active Management by black persons

Black Person Ownership

15.2 Black persons are as defined in Broad based black economic empowerment Act (B-BBEE) which currently means Africans, Coloureds and Indians:

- (a) who are citizens of the Republic of South Africa by birth or decent; or
- (b) who became citizens of the Republic of South Africa by naturalisation –
 - (i) before 27 April 1994.
 - (ii) on or after 27 April 1994 and who would have been entitled to acquire citizenship by naturalisation prior to that date.

Preference Point	Service Provider to INDICATE YES OR NO	No of Points per BANKSETA Preference point System	For BANKSETA USE Only Points Claimed
Does the service provider wish to claim points under black ownership and management where 51% or more ownerships and management is by black people		6	

IF YES please provide the following details

DETAILS OF BLACK OWNERS WHO ARE ACTIVELY MANAGING THE BUSINESS				
	Full Name of Black Owners who are Actively Involved in the Business	ID Number	Ownership Percentage (via shareholding)	Management Position in the Company
1				
2				
3				
4				

5				
6				
7				
8				
9				
10				
	TOTAL Black Ownership			

For shortlisted service providers, BANKSETA will request additional information and evidence to support the information shown for the preference points claimed. Please note that such additional information may include but is not limited to certified IDs, naturalisation records for owners not South African by birth and CIPC records of the entity.

2. Preference Points Claimed for Empowerment of 100% Local production of Goods or 100% Use of South African Citizens for Delivery of Services.

The goods supplied should be 100% manufactured or assembled in South Africa from 100% local materials and any services supplied should 100% utilising South African citizens.

Preference Point	Service Provider to Indicate YES OR NO	No of Points per BANKSETA Preference point System	For BANKSETA USE Only Points Claimed
Does the service provider wish to claim points under Promotion of Local production and Delivery by South Africans – 100% threshold		6	

IF YES please provide the following details

Details	Service Provider to Indicate YES or NO
2.1 If goods are to be supplied are these 100% assembled or manufactured in South Africa	

2. If goods are to be supplied are these 100% assembled or manufactured in South Africa	
2.3 If services are to be supplied, are these to be delivered 100% by South African citizens. Kindly note that the citizen status of employees is stated in the ID document	

For shortlisted service providers, BANKSETA will request additional information and evidence to support the information shown for preference points claimed. Please note that such additional information may include but is not limited to sworn affidavits, details of manufacturing/assembly plant, details of main raw material suppliers, employee lists and ID numbers.

3. Preference Points Claimed For Empowerment of Women – Through Women Ownership and Management of the Entity- Threshold 50%

Women ownership points will be awarded to a Tenderer who have 50% or more women ownership, who are actively involved in the day-to-day activities of the company or enterprise. The position and role that women owners play in the company should be stated. The woman should be South African citizens.

Preference Point	Service Provider to Indicate YES OR NO	No of Points per BANKSETA Preference point System	For BANKSETA USE Only Points Claimed
Does the service provider wish to claim points under women ownership and management where 50% or more ownerships and management is by women who are South African citizens		2	

IF YES please provide the following details

DETAILS OF WOMEN OWNERS WHO ARE MANAGING THE BUSINESS AND ARE SOUTH AFRICAN CITIZENS				
	Full Name of Black Owners who are Actively Involved in the Business	ID Number	Ownership Percentage (via shareholding)	Management Position in the Company
1				
2				
3				
4				
5				

6				
	TOTAL WOMEN OWNERSHIP & MANAGEMENT			

For shortlisted service providers, BANKSETA will request additional information and evidence to support the information shown for preference points claimed. Please note that such additional information may include but is not limited to certified IDs and CIPC records.

4. Preference Points Claimed for Empowerment of Youth Through Youth Ownership and management of the Service Provider /Enterprise– 33% Threshold

15.5 Youth ownership points will be awarded to a Tenderer who have 33% or more youth ownership being persons 35 years and below, determined at the date of tender/ RFQ closing. Youth ownership will be determined based on the shareholding of the members who are defined as youth and are South African citizens, who also manage the entity.

Preference Point	Service Provider to Indicate YES OR NO	No of Points per BANKSETA Preference point System	For BANKSETA USE Only Points Claimed
Does the service provider wish to claim points under Youth Ownership and management – 33% Threshold. The youth should be South African citizens		2	

IF YES please provide the following details

DETAILS OF YOUTH OWNERS WHO ARE MANAGING THE BUSINESS AND ARE SOUTH AFRICAN CITIZENS				
	Full Name of Black Owners who are Involved in the Business Management	ID Number	Ownership Percentage (via shareholding)	Management Position in the Company
1				
2				
3				
4				
5				
6				

	TOTAL YOUTH OWNERSHIP & MANAGEMENT			
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For shortlisted service providers, BANKSETA will request additional information and evidence to support the information shown for preference points claimed. Please note that such additional information may include but is not limited to certified IDs and CIPC records.

5. Preference Points Claimed For Empowerment of Persons With Disabilities - Ownership and Management or Employment of People with Disabilities – 20% threshold for Ownership and Management and 10% threshold for Employment of Persons with Disabilities of Youth Empowerment Through Youth Ownership and management – 33% Threshold

15.6 Persons with Disability Ownership points will be awarded to a Tenderer who have 20% or more shareholding by South African citizen persons with disability who are actively involved in the day-to-day activities of the company or entity are

OR

to tenderers who employ 10% or more South African persons with disability on a permanent basis. Disability ownership will be determined by the shareholding of the enterprise owned by such a South African citizen person with disability who are actively involved in the day-to-day activities of the company or enterprise

OR

by enterprises whose permanent staff complement consists of 10% or more South African citizen persons with disabilities. Any disabilities need to be legally verifiable for points to be claimed.

Kindly note that full points are awarded for either ownership/management of persons with disabilities or employment of persons with disabilities.

Preference Point	Service Provider to Indicate YES OR NO	No of Points per BANKSETA Preference point System	For BANKSETA USE Only Points Claimed
Does the service provider wish to claim points under? Persons with Disability Ownership points will be awarded to a Tenderer who have 20% or more shareholding by South African citizen persons with disability who are actively involved in the day-to-day activities of the company or entity are OR to tenderers who employ 10% or more South African persons with disability on a permanent basis.		2	

IF YES please provide the following details

DETAILS OF OWNERS WHO ARE MANAGING THE BUSINESS AND HAVE DISABILITIES AND ARE SOUTH AFRICAN CITIZENS
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	Full Name of Persons With Disabilities Owners who are Involved in the Business	ID Number	Ownership Percentage (via shareholding)	Management Position in the Company
1				
2				
3				
4				
5				
6				
	TOTALPERSON WITH DISABILITIES OWNERSHIP & MANAGEMENT			

AND/OR

Total Number of Permanent Employees	Number of Permanent Employees with Disabilities	% Of Employees With Disabilities

For shortlisted service providers, BANKSETA will request additional information and evidence to support the information shown for preference points claimed. Please note that such additional information may include but is not limited to certified IDs, CIPC records, employee list, disabilities list or certificates of disability.

6. Preference Points Claimed For Empowerment Small and Medium Enterprises Including Co-operatives and Non-Governmental Organisations in All Areas – Rural and Urban

15.7 Small and medium business includes all South African businesses, co-operatives and non-governmental organisations with annual turnover up to R10 million or alternatively, these entities are recently incorporated, have been operating for less than one year and are projected to have annual turnover of less than R10 million in the first year. The ownership of small and medium business, co-operatives or non-governmental organisations should be 100% South African citizens (or entities owned 100% by South Africa citizens).

Preference Point	Service Provider to Indicate YES OR NO	No of Points per BANKSETA Preference point System	For BANKSETA USE Only Points Claimed

Does the service provider wish to claim points under Small and medium business includes all South African businesses, co-operatives and non-governmental organisations with annual turnover up to R10 million or alternatively, these entities are recently incorporated, have been operating for less than one year and are projected to have annual turnover of less than R10 million in the first year. The ownership of small and medium business, co-operatives or non-governmental organisations should be 100% South African citizens (or entities owned 100% by South Africa citizens).		2	
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IF YES please provide the following details

DETAILS OF THE BUSINESS				
Dated Business Incorporated	Financial Year Ending	Turnover in Prior Financial Year of the Enterprise	Budgeted Turnover This Current Financial Year	Turnover to Date in Current Financial Year

For shortlisted service providers, BANKSETA will request additional information and evidence to support the information shown for preference points claimed. Please note that such additional information may include but are not limited to CIPC records, annual financial statements and sworn affidavits.

7. False Information from Bidders

Should the BANKSETA ascertain that any bidder has submitted any false information, the BANKSETA may disqualify the bidder/service provider, cancel any award without prejudice to any other remedies available to BANKSETA and report the service provider to National Treasury.

The bidder/service provider will be given an opportunity to give reasons why BANKSETA should not take actions detailed above where false information has been submitted.

SBD4**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

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.

or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract?

YES/NO

2.3.1 If so, furnish particulars:

.....

3 DECLARATION

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

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

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.

TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

PREFERENCE POINTS CLAIM FORM IN **TERMS OF BANKSETA PREFERENCE POINTS CLAIM**

This preference form must form part of all bids invited. It contains general information a

NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS,

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to all bids:

- 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

- a) The value of this bid is estimated to **not exceed** R50 000 000 (all applicable taxes included) and therefore the **80/20** preference point system shall be applicable; or
- b) Either the 80/20 preference point system will be applicable to this tender

1.3 Points for this bid shall be awarded for:

- (a) Price; and
- (b) Preference points using BANKSETA's preference point system.

1.4 The maximum points for this bid are allocated as follows:

	POINTS
PRICE	80
PREFERENCE POINTS USING BANKSETA PREFERENCE POINTS SYSTEM	20
Total points for Price and Preference points must not exceed	100

1.5 Failure on the part of a bidder to complete and submit BANKSETA's preference points form together with the bid, will be interpreted to mean that preference points are not claimed.

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

2. DEFINITIONS

- (a) **“bid”** means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of goods or services, through price quotations, advertised competitive bidding processes or proposals;
- (b) **“Broad-Based Black Economic Empowerment Act”** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- (c) **“EME”** means an Exempted Micro Enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (d) **“functionality”** means the ability of a tenderer to provide goods or services in accordance with specifications as set out in the tender documents.
- (e) **“prices”** includes all applicable taxes less all unconditional discounts;
 - 1)
- (f) **“QSE”** means a qualifying small business enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (g) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

3. POINTS AWARDED FOR PRICE

3.1 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

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

Where

- P_s = Points scored for price of bid under consideration
- P_t = Price of bid under consideration
- P_{\min} = Price of lowest acceptable bid

4. PREFERENCE POINTS CLAIMED

THE BIDDER SHOULD COMPLETE THE ATTACHED BANKSETA PREFERENCE POINTS CLAIM DOCUMENT

5. SUB-CONTRACTING

5.1 Will any portion of the contract be sub-contracted?

ENABLING SKILLS DEVELOPMENT IN THE BANKING AND MICROFINANCE SECTOR

(Tick applicable box)

YES		NO	
-----	--	----	--

7.1.1 If yes, indicate:

- i) What percentage of the contract will be subcontracted%.
- ii) The name of the sub contractor

6. DECLARATION WITH REGARD TO COMPANY/FIRM

6.1 Name of company/firm:.....

6.2 VAT registration number:.....

6.3 Company registration number:.....

6.4 TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One person business/sole propriety
- ☐ Close corporation
- ☐ Company
- ☐ Pty Limited

[TICK APPLICABLE BOX]

6.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

.....

.....

.....

.....

6.6 COMPANY CLASSIFICATION

- ☐ Manufacturer
 - ☐ Supplier
 - ☐ Professional service provider
 - ☐ Other service providers, e.g. transporter, etc.
- [TICK APPLICABLE BOX]

6.7 Total number of years the company/firm has been in business:.....

6.8 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the BANKSETA preference points system, qualifies the company/ firm for the preference(s) shown and I / we 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 6.1, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;

iv) If the bidder has been claimed or obtained preference points on a fraudulent basis

or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –

- (a) disqualify the person from the bidding 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 bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury 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.

<p>WITNESSES</p> <p>1.</p> <p>2.</p>	<p style="text-align: center;">..... SIGNATURE(S) OF BIDDERS(S)</p> <p>DATE:</p> <p>ADDRESS</p> <p>.....</p> <p>.....</p>
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