

**KZN GROWTH FUND AGENCY
REQUEST FOR QUOTATION (RFQ)**

RFQ REFERENCE NUMBER – REISSUE KZNGFA RFQ 2025 - 08

**PSYCHOMETRIC ASSESSMENTS AND BACKGROUND CHECKS FOR THE KZN GROWTH FUND
AGENCY FOR 36 MONTHS**

Closing date : **19 November 2025**

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 the Psychometric assessments and Background checks for 36 months.

Procurement Reference Number : KZNGFA RFQ 2025 - 08

Description of Goods & Services : Psychometric assessments and Background checks

Date of RFQ : 06 November 2025

Date of RFQ Closing : **19 November 2025**

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 service providers to provide KZNGFA with a Psychometric assessments and Background checks for the KwaZulu-Natal (KZN) Growth Fund Agency for 36 months.

2. BACKGROUND

KZN Growth Fund Agency (KZNGFA) is, 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.

2.2 Incorporated joint venture

KZNGFA would like to advise all companies that will submit responses as a Joint Venture (JV) that the below compliance requirements need to be noted.

- a) Bidders are to ensure that both members (companies) of the JV **must** submit completed and signed SBD 1, SBD 4, and SBD 6.1
- b) Bidders are to ensure that both members (companies) of the JV **must** submit Tax pins
- c) Bidders are to ensure that both members (companies) of the JV **must** submit CSD registrations.
- d) The JV agreement will direct which bank account of the two entities will be used.
- e) Consolidated Joint BBBEE Certificate.

3. SCOPE OF SERVICES REQUIRED

KZNGFA seeks to appoint a suitably qualified and experienced service provider for psychometric assessments and background checks for KZN Growth Fund Agency. Service providers must be able to do Background Checks for the candidates anywhere within the South African Borders

The appointed service provider will be responsible for the following activities:

- The design and customisation of assessment tools and techniques in accordance with KZNGFA guidelines:
- Conduct assessments with recommended candidates from the interview:
- Compile individual reports with developmental plan (if any) and feedback report to the panel on the assessment outcomes:
- Provide psychometric assessments and background checks at different organisational levels including but not limited to Executive, Senior Management and Middle Management and any other level as and may be requested.
- **To ensure that recommended Candidates have access to do the required assessments in all provinces within South Africa.**

The Background checks:

- Grade 12 / Matric verification
- Relevant academic qualification/s verification (SA & International)
- Professional membership verification
- Criminal record verification
- Identity number & citizenship verification
- Social Media Activities / Profiles report
- Credit bureau verification if necessary (ITC)
- Employment Reference verification

PSYCHOMETRIC ASSESSMENTS

The successful bidder will provide professional Psychometric services to KZNGFA. This will be done either virtually (online) or in-person. The services will include but not limited to following:

- **Administering and administration of assessments** must be done in within 72 hours from time of KZNGFA has issued an assessment request. This can be virtual but must be supervised by the psychometrist.

- **Assessment scoring and storing** must be done within 72 hours of the assessment being completed and results must be stored and backed up for retrieval at any time over the duration of the contract.
- **Interpretation and report compilation** must be comprehensive and integrative. Line manager summary reports and development reports must be dynamic and professional.
- **Feedback to assessed individuals** must be provided to the individuals assessed upon request for individual feedback. Feedback will be provided, in the case of recruitment once the recruitment process has been concluded.
- Comparative dashboard of candidates with summary of competencies
- Presentation of reports to the interview panel
- **Comprehensive report within 5 working days of request**

The Bidder should have in-depth knowledge in the following Assessment approach:

- Prepare the candidate before the assessment session and prepare for the session beforehand.
- Assist the candidate understand the purpose of the assessment.
- Ensure that the candidate is in the right frame of mind when completing assessments. – how would you measure this?
- Create/facilitate an enabling environment for the candidate to complete assessments productively.
- Practice high levels of ethical behaviour when providing psychometric services to the KZNGFA and its candidates/employees.

KZNGF will provide:

- Details of the candidates for verification and/or assessments
- Job profiles for assessments

4. CONTRACT DURATION

Contract for 36 months.

5. AWARD OF THE RFP

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

6. EVALUATION PROCESS AND CRITERIA

Selection will be conducted over three stages as detailed below:

Stage 1 - Compliance with Minimum Requirements

Stage 2 – Functionality Evaluation

Stage 3 – Price and Specific Goals

6.1 STAGE 1 – COMPLIANCE WITH MANDATORY REQUIREMENTS

6.1 All proposals must be completed and accompanied by:

- 6.1.1 Signed and completed RFQ document of bidder's details
- 6.1.2 SBD 1, SBD 4, and SBD 6.1
- 6.1.3 Evidence of registration on the National Treasury Central Supplier Database and a Compliant Tax Status (SARS Pin **must** be submitted if Tax Status is non-compliant).

6.2 All proposals must be accompanied by the below mandatory requirement:

- 6.2.1 Company Profile
- 6.2.2 The Psychologists/Psychometrist of the organisation /entity must be registered with the Health Profession Council (HPCSA) proof of registration must be attached.
- 6.2.3 Verification bidders must be a member of the National Association of Professional Background Screeners (NAPBS) or Professional Background Screening Association (PBSA) or Society for Professional Background Screeners (SABSA) or equivalent body.

All bids duly lodged as specified in this RFQ will be examined to determine compliance with the mandatory requirements and conditions. Failure to provide any mandatory information as requested above will result in the submission being deemed non-responsive.

6.3 STAGE 2 – FUNCTIONALITY EVALUATION

Scores will be tabulated to 50 points. Respondents must score 35 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 Table 1 below:

FUNCTIONAL EVALUATION CRITERIA	Weight
COMPANY EXPERIENCE Number of years the company has been in business in company profile. • Experience of more than 5 years – 10 points • Experience of 4 - 5 years – 5 points • Experience of 1 - 3 years – 3 points No submission of company profile will result in zero scoring Company registration number must support years of experience	10
REFERENCE LETTERS The service provider must have previously provided similar services. The bidder must provide at least three (3) references for Psychometric Assessment. • 3 Letter of Reference relevant to the scope of work – 15 points. • 2 Letter of Reference relevant to the scope of work – 10 points. • 1 Letter of Reference relevant to the scope of work – 5 points The bidder must provide at least three (3) references for Background Checks. • 3 Letter of Reference relevant to the scope of work – 15 points. • 2 Letter of Reference relevant to the scope of work – 10 points. • 1 Letter of Reference relevant to the scope of work – 5 points Letters must be on client letterhead, signed, and dated. Letters must not be older than 5 years.	30
QUALIFICATIONS AND EXPERIENCE OF THE ALLOCATED Resources for the assignment Provide 1 CV for background checks with proof of qualifications. (5) • Minimum of 10 years' experience in providing background checks and/or psychometric assessment services = 5 • Minimum of 8 years' experience in providing background checks and/or psychometric assessment services = 4 • Minimum of 5 years' experience in providing background checks and/or psychometric assessment services = 3	10

• Minimum of 3 years' experience in providing background checks and/or psychometric assessment services = 2 • Minimum of one (1) year experience in providing background checks and/or psychometric assessment services = 1 Resources for the assignment Provide 1 CV psychometric assessment with proof of qualifications. (5) • Minimum of 10 years' experience in providing background checks and/or psychometric assessment services = 5 • Minimum of 8 years' experience in providing background checks and/or psychometric assessment services = 4 • Minimum of 5 years' experience in providing background checks and/or psychometric assessment services = 3 Minimum of 3 years' experience in providing background checks and/or psychometric assessment services = 2 • Minimum of one (1) year experience in providing background checks and/or psychometric assessment services = 1 NB: Max of 5 points each for per CV and qualifications (lack of submission of proof of qualification / accreditation will lead to zero scoring)	
Minimum Threshold	35
TOTAL	50

Note: Failure to obtain the minimum of 35 out of 50 on functionality will result in disqualification from further evaluation.

6.4 STAGE 3 - PRICE AND SPECIFIC GOALS

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

6.4.2 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

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)

7. THE INFORMATION REQUIRED

You are required to provide the KZNGFA with a proposal, by **no later than 12:00pm on 19 November 2025.**

8. SUBMISSION DETAILS

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

Approved by



Bonga Khuzwayo
Human Resource Manager

Annexure A

NAME OF BIDDER: _____

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

Number	Service Component (Rates) Verifications	Turnaround time	Cost rate for each
1.	National Matric Qualification pre-1992		
2.	National Matric Qualification post 1992		
3.	Short courses/Certificates		
4.	South African Qualification		
5.	International Qualification		
6.	Professional Membership		
7.	ID and/or Passport Validation		
8.	Citizenship verification		
9.	Social Media Activities / Profiles reports		
10.	Credit Checks on Defaults/Judgments/Notices/Disputes/Previous Enquiries		
11.	Criminal AFIS Check – (At bidder office and onsite)		
12.	Employment Reference Check		
Sub-total			
VAT@ 15%			
Grand Total			

Number	Service Component (Rates) Psychometric Assessment	Cost rate for each
1	Executive level	
2	Senior Management level	
3	Middle Management level	
4	General Manager level	
5	Officer/Admin level	
Sub-total		
VAT@ 15%		
Grand Total		

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:	Reissue KZNGF-RFQ 2025 – 08	CLOSING DATE:	19 November 2025	CLOSING TIME:	12h00
DESCRIPTION	Psychometric Assessments and Background Checks for the KZN Growth Fund 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	Precious Mbambo	
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] ☐ Yes ☐ No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		[TICK APPLICABLE BOX] ☐ Yes ☐ 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]					
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?		☐ Yes ☐ No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED? ☐ Yes ☐ No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]	
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS					
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?				☐ YES ☐ NO	
DOES THE ENTITY HAVE A BRANCH IN THE RSA?				☐ YES ☐ NO	
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?				☐ YES ☐ NO	
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?				☐ YES ☐ NO	
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?				☐ YES ☐ 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:	
1.1.	BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
1.2.	ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.
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.
1.4.	THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).
2. TAX COMPLIANCE REQUIREMENTS	
2.1	BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
2.2	BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
2.3	APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA .
2.4	BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
2.5	IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
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.
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."

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 institution	State

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

SBD 6.1

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:

$$\begin{array}{ccc} \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\ \\ \mathbf{Ps = 80 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)} & \mathbf{or} & \mathbf{Ps = 90 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)} \end{array}$$

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:

$$\begin{array}{ccc} \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\ \\ \mathbf{Ps = 80 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)} & \mathbf{or} & \mathbf{Ps = 90 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)} \end{array}$$

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	/	
Black Women Ownership		4		
Black Youth Ownership		3		
Disability		3		

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:

.....

.....

.....