



4th Floor
Riverwalk Office
Park
Block A, 41 Matroosberg Road
Ashlea Gardens
PRETORIA
SOUTH AFRICA
0081

P.O. Box 580, **MENLYN**,
0063 **Tel:** 012 346 1738, **Fax:** 086
693 7472 **E-Mail:** tenders@pfa.org.za
Website: www.pfa.org.za

REQUEST FOR QUOTATION (RFQ): STAKEHOLDER SATISFACTION SURVEY AND FEEDBACK

REQUEST FOR QUOTATION (RFQ 62/2023)

CLOSING DATE: 6 NOVEMBER 2023

TIME: 11:00

The Office of the Pension Funds Adjudicator was established in terms of Section 30B of the Pension Funds Act, 24 of 1956. The service offered is free to members of the public.



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1. **INTRODUCTION**

- 1.1. The Office of the Pension Funds Adjudicator (OPFA) is a schedule 3A entity established in terms of section 30B of the Pension Funds Act No.24 of 1956 with effect from 1 January 1998 to investigate and determine complaints lodged in terms of the Pension Funds Act in a procedurally fair and expeditious manner.
- 1.2. It is funded in terms of section 30R of the Pension Funds Act by way of a levy imposed by national legislation and collected by the Financial Sector Conduct Authority.
- 1.3. The mandate of the OPFA is to ensure a procedurally fair, economical, and expeditious resolution of complaints in terms of the ACT, by:
 - 1.3.1 Ensuring that its services are accessible to all
 - 1.3.2 Investigating complaints in a procedurally fair manner
 - 1.3.3 Reaching a just and expeditious resolution of complaints in accordance with the ACT.

2. OBJECTIVES AND OUTCOMES OF THE PROJECT

- 2.1. As part of the OPFA's strategic objective "Effective Stakeholder Engagement" the OPFA seek to educate consumers of pension related products and services and establish value-adding relationships with internal and external stakeholders.
- 2.2. The purpose of this Request for Quotation (RFQ) is to invite proposal from prospective bidders and to appoint a research service provider to conduct a stakeholder satisfaction survey across all 9 provinces.
- 2.3. The purpose of the survey is to:
 - 2.3.1 Measure the perception, knowledge and impact of organisation.
 - 2.3.2 Determine the level of satisfaction of stakeholders on the work done by the OPFA.
 - 2.3.3 Identify ways of improving and enhancing the service engagement and offerings of the organisation.
- 2.4. The sample of complaints will cover the period from **1 April 2022 to 31 March 2023**.

3. SCOPE OF WORK

- 3.1. The successful bidder will be required to develop questionnaires and conduct a survey using the appropriate methodology based on the key stakeholders of the organisation. The area of focus is to measure customer attitudes and perceptions about the OPFA regarding:
 - 3.1.1 The customers' knowledge and understanding of the organisation.
 - 3.1.2 The service value the organisation presents.
 - 3.1.3 The accessibility and visibility of the Office.
 - 3.1.4 The overall brand/image perception, attitude, and level of awareness of the stakeholders.
 - 3.1.5 The case handling process and management of the disposing of complaints.
 - 3.1.6 The effectiveness of administration processes and timeframes when lodging complaints.
 - 3.1.7 The preferred method of communication, platform, and frequency.
 - 3.1.8 Whether the perceptions and customer satisfaction have improved or declined from the last survey conducted in 2019/20.

- 3.2. The appointed service provider will also be required to:
- 3.2.1 Design and develop relevant survey questionnaire.
 - 3.2.2 Survey the identified sample of stakeholders.
 - 3.2.3 The survey should be conducted on a reasonable percentage of the total key stakeholder using the best available sampling method.
- 3.3. Analyse and capture survey responses.
- 3.3.1 Present a detailed analysis using write-ups, graphic figures and charts.
 - 3.3.2 Assess the overall interaction and performance of the organisation with an overall stakeholder satisfaction rate i.e. a quantifiable average as a percentage.
 - 3.3.3 Provide insights from the feedback of stakeholders and advise which service areas require the most attention by highlighting areas of weakness and improvement.
 - 3.3.4 Identify performance shortfalls, areas of development and skills gaps.
 - 3.3.5 Deliver a comprehensive report of the research findings and recommendations.
 - 3.3.6 Engagements with the Management and feedback
- 3.4. **Sample of key targeted stakeholders**

Description	Sample*
Individuals	262
Funds & Fund administrators	22
Employers	90
Total targeted sample of key stakeholders	374

**N= 12 960, assuming confidence level of 95% and sample error of 5%*

3.5. **Other targeted sample of stakeholders test at 100% include:**

- Media - Less than 20 entities
- Regulator (FSCA) – 1 entity
- Financial Services Tribunal – 1 entity
- Ombud Council – 1 entity
- Industry bodies and other entities – Less than 20 entities

4. DELIVERABLES AND TURNAROUND TIMES

- 4.1. The project must be completed by **15 March 2024** and two hard copies of the report as well as a soft copy should be presented to the OPFA.

Activities	Start date	End Date
• Invitation and receiving of proposals. • Evaluation of proposal and appointment of the service provider.	6 November 2023	10 November 2023
• Development of the scope, deliverables and sample size. • Develop a questionnaire that will be pre-approved.	15 November 2023	30 November 2023
• Data collection and implementation of the survey • Analysis of the results • Compilation of findings	01 December 2023	29 February 2024
Survey report and presentation		15 March 2024

5. MINIMUM REQUIREMENTS

The appointed service provider:

- Must submit their full profile with at least 3 years' experience in conducting market research, data analysis and surveys.
- Must have a qualified lead researcher that possesses the relevant research qualifications with a proven track record of conducting stakeholder surveys.
- Must have the capacity and resources to deliver the outcome of the report within the specified timeframe(s) and be flexible enough to meet the client's deadline and needs.
- Should submit their proposals with a minimum of 3 contactable references of services rendered in the past for similar work.

6. SUBMISSION

- 6.1. Upon sign-off, the service provider will be required to submit two hard copies of the detailed report, 1 soft copy of the report in Word format and a PowerPoint presentation detailing the summary of the report on a USB flash drive.
- 6.2. Interested organisations are requested to submit their proposals and documents via e-mail to tenders@pfa.org.za by no later than **6 November 2023**.

7. PRICING

7.1. Pricing Schedule

#	Scope	Amount Excl VAT
1.	• All costs involved in conducting the research including planning, meetings, questionnaires • Development of the scope, deliverables and sample size. • Develop questionnaires that will be approved by the OPFA • Survey Methodology	
2.	• Survey the identified sample of stakeholders • implementation and data collection and of the survey including appropriate platform	
3.	• Analysis of the results • Compilation of findings • Preliminary report	
4.	Survey report and presentation Close out report	
5.	Other applicable cost (Specify)	
Total Exc VAT		
VAT (where applicable)		
Total inclusive of VAT (Bid Price)		

- 7.1.1 Bidders must use the Pricing schedule as template for pricing. The costs can be provided on bidders' letterhead.
- 7.1.2 The costing must be comprehensive and include all costs of providing the whole service as per the scope section taking into consideration providing all assumptions in drawing up the quotation including all cost factors .
- 7.1.3 Only firm prices received will be accepted. Bid will be valid for the period of sixty days from closing date.
- 7.1.4 Items that are applicable to the project which are not specified should be included under item cost "Other" and be specified on the pricing
- 7.1.5 Invoice and billing of the milestone will be payable by the OPFA , upon confirmation of the of the completion of the specific milestone and acceptance by the OPFA Project Manager.

8. EVALUATION

- 8.1. The 80/20 preference point system shall be applicable to this bid, where 80 points represent maximum obtainable points for the lowest acceptable price, and 20 points represents the specific goals. Points will be awarded to a bidder for attaining the specific goals outlined in accordance with the table below:

#	Specific Goals of Preference	Proof/ Evidence required	Points Allocation
01	51% or more ownership by black people	CSD report/BEE Certificate or Sworn Affidavit	5
02	51% or more ownership by black women	CSD report/BEE Certificate or Sworn Affidavit	5
03	30% or more ownership by people living with disabilities	CSD report/BEE Certificate or Sworn Affidavit	3
04	30% or more ownership by youth	CSD report/BEE certificate or Sworn Affidavit	3
05	EME/QSE	CSD Reports/ BEE certificate or Sworn affidavits	4
TOTAL POINTS			20

- 8.2.1 To claim preference point bidders must submit evidence of the specific goals as per the table above. No points will be allocated if no supporting evidence is provided when submitting the bid.
- 8.2.2 The OPFA will further extract CSD reports from the CSD system during the evaluation of bids. It is the responsibility of the Bidders to ensure information is updated and correct as per the points being claimed.

9. PROTECTION OF PERSONAL INFORMATION ACT (POPIA)

- 9.1. "POPIA" shall mean the Protection of Personal Information Act (Act Number 4 of 2013), as amended from time to time.
- 9.2. Personal Information" (PI) shall mean the race, gender, sex, pregnancy, marital status, national or ethnic origin, colour, sexual orientation, age, physical or mental health, disability, religion, conscience, belief, culture, language and birth of a person; information relating to the education or the medical, financial, criminal or employment history of the person; any identifying number, symbol, email address, physical address, telephone number, location information, online identifier or other particular assignment to the person; the biometric information of the person; the personal opinions, views or preferences of the person; correspondence sent by the person that is implicitly or explicitly of a private or confidential nature or further correspondence that would reveal the contents of the original correspondence; the views or opinions of another individual about the person whether the information is recorded electronically or otherwise.
- 9.3. The parties acknowledge that for the purposes of this bid and agreement the parties may come into contact with, or have access to PI and other information that may be classified, or deemed as private or confidential and for which the other party is responsible. Such PI may also be deemed or considered as private and confidential as it relates to any third party who may be directly or indirectly associated with this agreement. Further, it is acknowledged and agreed by the parties that they have the necessary consent to share or disclose the PI and that the information may have value.
- 9.4. The parties agree that they will at all times comply with POPIA's Regulations and Codes of Conduct and that it shall only collect, use and process PI it comes into contact with pursuant to this agreement in a lawful manner, and only to the extent required to execute the services, or to provide the goods and to perform their respective obligations in terms of this agreement.
- 9.5. The parties agree that it shall put in place, and at all times maintain, appropriate physical, technological, and contractual security measures to ensure the protection and confidentiality of PI that it, or its employees, its contractors or other authorised individuals comes into contact with pursuant to this agreement.
- 9.6. Notify each other immediately where it has reasonable grounds to believe that the Personal Information in respect of this agreement, which has been provided to it including any Personal Information which it has processed, has been lost, destroyed, or accessed or acquired by any unauthorised person.
- 9.7. Unless so required by law, the parties agree that it shall not disclose any PI as defined in POPIA to any third party without the prior written consent of the other party, and notwithstanding anything to the contrary contained herein, shall any party in no manner whatsoever transfer any PI out of the Republic of South Africa.

STANDARD BIDDING FORMS: PARTA: INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE OFFICE OF PENSION FUNDS ADJUDICATOR							
BID NUMBER:	RFQ: 62/2023		CLOSING DATE: 6 November 2023		CLOSING TIME:		11:00
DESCRIPTION	STAKEHOLDER SATISFACTION SURVEY AND FEEDBACK						
BID RESPONSE DOCUMENTS MUST BE SUBMITTED ELECTRONICALLY							
QUOTATIONS AND ALL SUPPORTING DOCUMENTS MUST BE EMAILED TO: tenders@pfa.org.za							
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO				TECHNICAL ENQUIRIES MAY BE DIRECTED TO:			
CONTACT PERSON	Sthembiso Shabalala			CONTACT PERSON	Magadi Tshitanyne		
TELEPHONE NUMBER	012 748 4048			TELEPHONE NUMBER	012 748 4048		
FACSIMILE NUMBER				FACSIMILE NUMBER			
E-MAIL ADDRESS	tenders@pfa.org.za			E-MAIL ADDRESS	tenders@pfa.org.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, **2022**, 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:

SBD 4: 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:

.....
.....

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

2.3 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:

.....
.....

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

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.

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.

.....
Date

.....
Signature

.....
Position

.....
Name of bidder

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.

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 (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
51% or more ownership by black people	5	
51% or more ownership by black women	5	
30% or more ownership by people living with disabilities	3	
30% or more ownership by youth	3	
EME/QSE	4	
Total points allocated	20	
Number of points claimed by the bidder		

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:	
	
	
	