

REQUEST FOR QUOTES No.:	001-2025
DESCRIPTION:	REQUEST FOR QUOTES FOR A SERVICE PROVIDER TO PROOF READ, EDIT, DESIGN AND LAY OUT STATUTORY PUBLICATIONS OF THE TECHNOLOGY INNOVATION AGENCY FOR A THREE-YEAR PERIOD
CLOSING TIME AND DATE	23 June 2025 at 14h00 No late quotations will be accepted
DELIVERY DETAILS:	Electronic version of quotes, including the price must be e-mailed to <a href="mailto:Mapule.Msiza@tia.org.za">Mapule.Msiza@tia.org.za</a> .
CONTACT PERSON:	Mapule Msiza, at the above e-mail address
DURATION OF CONTRACT	For a period of approximately three-years, commencing when a service-level agreement is entered into between TIA and the selected service provider until the service provider provides the final deliverable of the final publication to TIA's satisfaction

## Background

TIA was established in terms of the TIA Act, (Act No. 26 of 2008), with the objective to stimulate and intensify technological innovation in order to improve economic growth and the quality of life of all South Africans.

### 1. Proposal

TIA invites experienced service providers (SPs) to submit proposals to proof read, edit, design and layout the following TIA's statutory publications/reports for a period of thirty six (36) months:

- 2025/26 Annual Report (undertaken in mid-2026)
- 2026/27 Annual Report (undertaken in mid-2027)
- 2027/28 Annual Report (undertaken in mid-2028)
- 2026/27 Annual Performance Plan (undertaken in late 2025 to early 2026)
- 2027/28 Annual Performance Plan (undertaken in late 2026 to early 2027)
- 2028/29 Annual Performance Plan (undertaken in late 2027 to early 2028)

(Above dates are indicative and are subject to change.)

- Proposals are to be prepared and submitted at the Service Providers own cost.

### 2. Proposal requirements

- Proposals must be limited to 30 pages, excluding appendices and attachments such as example reports or reference letters.
- Aside from appendices and attachments, and administrative requirements as specified by TIA Supply Chain Management (e.g. Standard Bidding Documents and etc.), the proposal must be one single document (not a collection of individual documents).
- Proposals must respond to the following:

#### a) Summary of experience in producing reports

- Provide an overview of the company's experience pertaining to professional services provided to proofread, edit, design and layout annual reports (ARs), annual performance plans (APPs) strategic plans or equivalent reports/plans. Clearly state how

many years of operating experience the company has had in producing such reports/plans in the proposal.

- List minimum of three (3) contactable clients in the public sector who you developed reports for in the last five years, providing contact details (names, designation, organisation, phone numbers and email address) for these clients, including the date of the most recent delivery/provision of service to the client. Letters of reference should be attached as appendices to the main proposal, but this information must be provided in one table within the body of the proposal. Reference letters need to be on the client's official letterhead and be signed by the client.
- In the instance when more than three contactable clients are provided, TIA shall make use of only the first three clients listed when assessing proposals. The 4<sup>th</sup> (and onwards) listed clients will be disregarded.

#### **b) Copy editing and proof reading**

- A summary of the SP's copy editing and proof reading capabilities and experience should be provided in the main body of the proposal.
- Resumes of the content editors/proofreaders who will be responsible for TIA's statutory reports should be attached as appendices to the main proposal. Individual resumes should be no more than two pages in length.

#### **c) Graphic design and layout**

- A summary of the SP's graphic design and layout capabilities and experience should be provided in the main body of the proposal.
- Specify what hardware and software will be used for the design of the reports.
- Resumes of the graphic designers who will be responsible for TIA's reports should be attached as appendices to the main proposal. Individual resumes should be no more than two pages in length.
- Provide one concept design for the 2026/27 APP and three concept designs for the 2025/26 AR (i.e. four in total). In this respect, a 'concept design' shall include a cover design, section dividers, a mock-up CEO Foreword, a mock-up main body extract (including a mix of text, figures and tables), a mock-up annual financial statement extract (for ARs only) and a short design description/rationale. Concept designs should be attached as appendices to the main proposal. It should be noted that while three

2026/27 APP concept designs and one 2025/26 AR concept design are required in the proposal, each subsequent report will require the development of concept designs as per Section 3.2. The three 2026/27 APP concept designs and one 2025/26 AR concept design may be used as the basis for developing the final concept design for these first two reports.

**d) Project plan**

- Develop and submit a provisional project plan to render the required services, making provision for unforeseen circumstances to ensure the plan is achievable.

**e) Electronic report examples**

- Provide examples of three reports that you have developed in the last five years in electronic format. One of these reports must be an APP or a strategic plan (or equivalent), and one report must be an AR (or equivalent).
- In the instance when more than three example electronic reports are provided, TIA shall make use of only the first three reports furnished based on an alpha-numeric ordering (descending) of the file names when assessing proposals. The fourth (and onwards) example electronic reports will be disregarded.

**f) Proposal sections**

Proposals (one single document limited to 30 pages) shall have the following sections:

- Introduction and company overview
- Summary of experience in producing reports (including a table listing five contactable clients)
- Copy editing and proof reading capabilities
- Graphic design and layout capabilities
- Understanding of TIA's purpose in the context of the local and international innovation ecosystem
- Project plan
- Grand total budget/costing for all of the six reports

Proposal appendices as follows:

- Budget/costing for each of the seven individual reports
- Concept designs (one for the 2026/27 APP and three for the 2025/26 AR)

- Copy editor/proofreader resumes (maximum 2 pages per person)
  - Graphic designer resumes (maximum 2 pages per person)
  - Resumes of key individuals\* (maximum 2 pages per person)
  - Sample reports
- \* Key individuals who will be involved in delivering the service to TIA such as the project manager, traffic coordinator, etc. Do not list other employees or directors who will not play any active role in delivering the required service.

### 3. Expectations and deliverables

The SP is expected to deliver/undertake/adhere to the following.

#### a) Project plan

- Prior to the commencement of any process to proofread, edit, design and lay out each of the aforementioned statutory reports, the SP will be required to develop and submit an updated project plan for the respective report required by TIA. This project plan will be based on a to-be-communicated schedule of milestones and deadlines for a particular report, which is not yet available to TIA as of writing. TIA needs to approve the project plan prior to commencement of work.
- The project plan for each report shall be based on (but not limited to) the following:
  - Timelines (milestones and deadlines) sent to SP.
  - Project plan submitted to TIA for approval.
  - Kick-off meeting (SP and TIA).
  - First draft report sent to SP.
  - Proof-read and copy edited first draft report produced by SP.
  - Concept designs produced by SP.
  - Approval of the content of the draft final report (TIA).
  - Approval of the creative concept/concept design (TIA).
  - Approved draft final report sent to SP.
  - Proof-read and copy edited final draft report produced by SP.
  - Word document locked (no major content changes by TIA)
  - Print layout commences by SP.
  - Final proof produced by SP and sent to TIA.

- Approval of the final proof final report (TIA).
- Provision of a Word version of the final approved document by the SP.
- Production of presentation template and slide deck (for presentation to Minister/Parliamentary Portfolio Committee) by SP.
- TIA reserves the right to change or extend deadlines/milestones by agreement and engagement with the SP.

**b) Conceptualisation, design and layout**

- The selected SP is to develop concept themes centred around technological innovation and related for each of the six reports. The concept theme should be adaptable to both landscape and portrait layout options.
- The selected SP will be required to develop and refine at least three concept designs ('concept design' defined in Section 2(c) above) for each of the six statutory reports, with up to three revisions undertaken to the preferred concept design. TIA also reserves the right to request further concept designs at no additional cost should it deem, at its sole discretion, that the submitted designs are inadequate for the intended statutory report or do not reflect the TIA brand.
- The SP will also be required to design and conceptualise a creative for a presentation that contains key elements of the publication for each report, which should be informed by the approved design for the report. Production of a slide deck/presentation (40 slides maximum) and stand-alone template is required. The SP should incorporate the selected/approved concept/cover design and other design elements of the main report into the slide deck and template. The presentation template shall contain a cover slide, up to five section divider slides, a selection of different body slides (up to five) and an end/thank-you slide. The contents of the slide deck will be provided by TIA, and the SP will be expected to redraw, create or source any figures or graphics required and redraw tables provided.
- The theme and style of the concept designs must be in accordance with TIA's corporate identity and the co-branding requirements of the DSTI and government.

**c) Content management**

- Copy will be supplied electronically by TIA.

- The SP is to manage version control and all layout drafts until final signoff.
- Professional editing and proof reading is required for all six reports. Up to six rounds of partial follow-on copy editing/proof reading are required per report.
- Professional graphic design and layout is required for all six reports. Up to six amended graphic design and layout versions/iterations are required per report.
- The cost of any stock photography or graphics and use thereof in TIA's reports shall be incorporated into the SP's costing for layout and graphic design.
- The SP is to provide an editable Microsoft Word version of the final copy-edited report documents and both low-resolution and high-resolution PDF files of the final laid-out report documents for each of the six reports.
- The slide deck and presentation template shall be provided in Microsoft PowerPoint.

**d) Other requirements and expectations of the Service Provider:**

- Be prepared to meet regularly with the TIA team.
- Be prepared to work after normal office hours when deadlines are tight.
- Provide guidance to TIA to ensure that the statutory reports produced adhere to the requirements contained in the respective frameworks and guidelines of the National Treasury and Department of Planning, Monitoring and Evaluation for schedule 3A and 3B public entities and provide suggestions to TIA to ensure that a quality integrated statutory report is produced.
- Ensure that there is cohesion and flow in terms of content, design, language and writing style across and between reports.
- Make draft and final electronic reports available to TIA using an appropriate web-based file transfer service.
- Should any of the key SP personnel (content editors and graphic designers) be replaced or changed, TIA shall be advised. Any replacement key personnel shall be at an equivalent or higher competency/skill level, and TIA reserves the right to assess the same and request changes to the replacement personnel if it deems such changes insufficient.
- The anticipated page count (including covers) of reports is as follows:
  - ARs: 160 pages
  - APPs: 100 pages



- (It should be noted that the page counts for the above three types of reports is indicative and may be subject to change.)

#### 4. Quoting Template

Please make use of the following quotation template.

Your proposal should contain a grand total budget/costing table, with six individual budget/costing tables (three ARs, three APPs) in the appendices.

REQUIREMENT	PRICE (Incl. VAT)
Creative designs/concepts	
Proof reading and copy editing* (Also specify hourly rate and maximum number of hours separately)	
Layout and design (including stock images)* (Also specify hourly rate and maximum number of hours separately)	
Production of a 40-slide presentation and template	
Other costs (please specify)	
<b>Total</b>	

\* While the total costs for proof reading and copy editing (based on up to six rounds of partial follow-on copy editing/proof reading per report) and layout and design (based on up to six amended graphic design and layout versions/iterations per report) need to be provided in the proposal document, SPs should note that **TIA shall be billed based on the actual work done at the specified deliverable.**

#### 5. Important Notices

- SPs are required to attend a compulsory briefing session (via Microsoft Teams) on 18 June 2025 at 11:00am. Sent and email to [mapule.msiza@tia.org.za](mailto:mapule.msiza@tia.org.za) to ask for briefing session link
- SPs will be required to present their proposal to TIA (Times to be confirmed one week prior to the presentation date.)



- Proposals and presentations reflecting the Request for Quotations reference number must be e-mailed to [Mapule.Msiza@tia.org.za](mailto:Mapule.Msiza@tia.org.za) by 23 June 2025 at 14h00.
- Proposals and presentations not received by TIA by the due date and time will not be considered.
- TIA reserves the right to not consider proposals which do not adhere to the minimum requirements as contained in this document. This includes, but is not limited to the following:
  - Maximum 30-page main proposal (excluding appendices).
  - Main proposal must be one single document, not a collection of individual documents.
  - Maximum 2-page resumes for each copy editors/proof reader, graphic designer and other key personnel.
  - Proposal to adhere to the specified section headings.

## **6. Guidance to SPs with respect to concept designs**

TIA's core objectives relates to technological innovation and commercialisation, implementing the Bio-economy strategy, and providing science, engineering, technology and enterprise development support to small, medium and micro-sized entrepreneurs and cooperatives. Given the imperatives of South Africa as a developmental state and the need to harness science, technology and innovation for transformation and inclusive growth and development, TIA can be seen as an innovation and development funding organisation.

Historically the initial design concepts from prospective SPs have focused on the 'high-tech' (robotics, electronics, 3D printing, virtual reality, etc.). Sapphire and Egyptian blues tend to dominate such designs too. SPs are advised to consider alternative designs (and colour selection) to conventional perceptions of technology and innovation.

SPs are advised to access the TIA Publications sub-page on the TIA website (<https://www.tia.org.za/press-and-media/>) which contains a comprehensive library of current and past APPs and ARs for reference.



## 7. Evaluation Criteria

### 7.1 First Stage: Functionality/Technical Evaluation

Adjudication categories and criteria	Weight	Score
<p>1. <b>Organisational experience</b> (Years of relevant operating experience for the SP in producing reports and plans.)</p> <p><b><u>Score:</u></b></p> <p>5 = More than 5 years experience.</p> <p>4 = 3-5 years experience.</p> <p>3 = 2-3 years experience.</p> <p>2 = 1-2 years experience.</p> <p>1 = Less than 1 year experience.</p> <p>0 = Not clearly specified.</p>	0.15	5
<p>2. <b>Client references</b> (Track record of the SP in report/plan design and layout: A minimum of 3 and maximum of 5 signed reference letters from contactable clients on the client's letterhead).</p> <p><b><u>Score:</u></b></p> <p>5 = 5 reference letters provided, all from public sector, highly relevant and signed</p> <p>4 = 4 reference letters provided, mostly relevant with positive feedback.</p> <p>3 = 3 reference letters provided, mixed relevance all with positive feedback.</p> <p>2 = 2 reference letters provided, semi relevant both with positive feedback.</p> <p>1 = 1 relevant reference letter provided with positive feedback.</p>	0.15	5

Adjudication categories and criteria	Weight	Score
<p>0 = No relevant reference letters provided with positive feedback.</p>		
<p>3. <b>Experience – Graphic design and layout team</b> (Experience of the design and layout team.)</p> <p><b><u>Score:</u></b></p> <p>5 = Resumes indicate 10 years or more of experience in designing and laying out reports/plans (or equivalent).</p> <p>4 = Resumes indicate 6-10 years of experience in designing and laying out reports/plans (or equivalent).</p> <p>3 = Resumes indicate 3-6 years of experience in designing and laying out reports/plans (or equivalent).</p> <p>2 = Resumes indicate 1-3 years of experience in designing and laying out reports/plans (or equivalent).</p> <p>1 = Resumes indicate less than 1 year of experience in designing and laying out reports/plans (or equivalent).</p> <p>0 = Experience not specified or unclear.</p> <p>(Years of experience of a team will be the average of each person's experience.)</p>	0.2	5
<p>4. <b>Experience – Copy editing and proof-reading team</b> (Experience of the editorial team.)</p> <p><b><u>Score:</u></b></p> <p>5 = Resumes indicate 10 years or more of experience in proof reading and editing reports/plans (or equivalent)</p>	0.2	5

Adjudication categories and criteria	Weight	Score
<p>4 = Resumes indicate 6-10 years of experience in proof reading and editing reports/plans (or equivalent)</p> <p>3 = Resumes indicate 3-6 years of experience in proof reading and editing reports/plans (or equivalent)</p> <p>2 = Resumes indicate 1-3 years of experience in designing and laying out reports/plans (or equivalent).</p> <p>1 = Resumes indicate less than 1 year of experience in designing and laying out reports/plans (or equivalent).</p> <p>0 = Experience not specified or unclear.</p> <p>Years of experience of a team will be the average of each person's experience. The SP's proposed editing and proof-reading team must have relevant qualifications, skills and experience.</p>		
<p>5. <b>Quality of proposal</b> (Level of quality of the proposal in terms of response to guidance and instructions contained in the request for quotes.)</p> <p><b><u>Score:</u></b></p> <p>5 = Complies with 100% of quote specifications*</p> <p>4 = Complies with 80% of quote specifications*</p> <p>3 = Complies with 50% of the quote specifications*</p> <p>2 = Complies with 20% quote specifications*</p> <p>1 = Complies with 5% quote specification*</p> <p>0 = non-compliant proposal to quote specifications*</p> <p>* Includes (but is not limited to) maximum 30 pages (excl. appendices and attachments), a single proposal document, with</p>	0.15	5

Adjudication categories and criteria	Weight	Score
the required proposal sections and 2-page resumes. See Section 2 Proposal Requirements above for the specifications.		
<b>6. Quality of submitted example electronic reports/plans</b>  <b><u>Score:</u></b>  5 = Report/plan examples are professional in terms of content and design and meet requirements 100% (look and feel).  4= Report/plan examples meet 90% of required content and design (look and feel).  3 = Report/plan examples meet 70% of required content and design (look and feel).  2= Report /plan examples meet 40% of required content and design  1= Report/plan examples meet 5% of required content and design  0 = Report/plan examples are amateurish or unprofessional in terms of content and design (look and feel).	<b>0.15</b>	<b>5</b>
<b>Total weighted score/Maximum possible score</b>	<b>1.0</b>	
<b>Minimum qualifying score</b>	<b>70%</b>	

**NB: The minimum qualifying score (expressed as percentage) for proposals is 70%.**

## 7.2 Second stage: Presentation of proposals

All SPs who met the minimum qualifying score of 70% are expected to present their proposals to TIA. SPs will have the opportunity to showcase their creativity, understanding of TIA's purpose and expand on the envisaged project plan (concept to implementation). The presentation will be made Microsoft Teams and shall last no more than 45 minutes (including time for questions). SPs are advised to structure their presentation according to

the evaluation criteria below.

**Evaluation criteria for the second stage:**

Creativity of concepts proposed to implement the project	5 = Excellent; 4 = Good, 3 = Acceptable; 2 = Poor; 1 = Very Poor; 0 = Unacceptable
Understanding TIA's purpose and the ecosystem within which it operates as expressed in the creative design concepts	5 = Excellent; 4 = Good, 3 = Acceptable; 2 = Poor; 1 = Very Poor; 0 = Unacceptable
Understanding of project objectives and deliverables based on presenting a project plan with deliverables and timeframes, linked to Section 3(a) above, clearly stating how the SP will coordinate the project from inception to editing to design	5 = Excellent; 4 = Good, 3 = Acceptable; 2 = Poor; 1 = Very Poor; 0 = Unacceptable
Interpretation of TIA's brief and expectations (this request for quotations)	5 = Excellent; 4 = Good, 3 = Acceptable; 2 = Poor; 1 = Very Poor; 0 = Unacceptable

**NB: The minimum qualifying score (expressed as percentage) for presentations is 70%.**

**7.3 Third Stage: Evaluation in terms of 80/20 (Specific Goals)**

Subject to meeting the minimum scores of 70% for the evaluation of written proposals and the evaluation of presentations (first stage and second stage, respectively), the two highest-scoring SPs will proceed to the third stage of the evaluation and will be evaluated further based on 80/20 preferential point system as below:



Specific Goal	Points	Proof
At least 51% Black ownership	10	Share register or Central Supplier Database report
Less than 51% Black ownership	0	
At least 51% Black Women ownership	10	Central Supplier Database report or Share Register with the copy of and ID
Less than 51% Black Women ownership	0	
<b>Total points for specific goals</b>	<b>20</b>	
<b>Price</b>	<b>80</b>	<b>Quotation</b>
<b>Total</b>	<b>100</b>	

## 8. Contacts

All enquiries regarding this specification shall be submitted in writing to Ms Mapule Msiza ([mapule.msiza@tia.org.za](mailto:mapule.msiza@tia.org.za))

## 9. Medium of Communication

All documentation submitted in response to this request must be in English.

**10. Verification of Documents** Respondents should check the numbers of the pages to satisfy themselves that none are missing or duplicated. No liability will be accepted by TIA in regard to anything arising from the fact that pages are missing or duplicated.

**11. Mandatory Requirements of the electronic proposal (Failing to meet any of these requirements will lead to disqualification of the proposal):**

- Completed standard bidding documents
- Compliant tax status on the Central Supplier Database (CSD)
- The supplier must be registered on the CSD

**12. Pricing**

Costs must be in South African Rand and inclusive of VAT. **Please make use of the Quoting Template provided in Section 5.**

**13. Proposals must be e-mailed to [Mapule.Msiza@tia.org.za](mailto:Mapule.Msiza@tia.org.za) by 23 June 2025 at 14h00.**

## **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 interest<sup>1</sup> 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.

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<sup>1</sup> 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.

Full Name	Identity Number	Name of State institution

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

2.2.1 If so, furnish particulars:

.....  
.....

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

2.3.1 If so, furnish particulars:

.....  
.....

### 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 consortium<sup>2</sup> 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

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<sup>2</sup> 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.

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**

### **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**

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#### **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:

80/20	or	90/10
$P_s = 80 \left( 1 - \frac{P_t - P_{min}}{P_{min}} \right)$	or	$P_s = 90 \left( 1 - \frac{P_t - P_{min}}{P_{min}} \right)$

Where

$P_s$  = Points scored for price of tender under consideration

$P_t$  = Price of tender under consideration

$P_{min}$  = Price of lowest acceptable tender

#### 3.2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

##### 3.2.1. POINTS AWARDED FOR PRICE

A maximum of 80 or 90 points is allocated for price on the following basis:

80/20	or	90/10
$P_s = 80 \left( 1 + \frac{P_t - P_{max}}{P_{max}} \right)$	or	$P_s = 90 \left( 1 + \frac{P_t - P_{max}}{P_{max}} \right)$

Where

$P_s$  = Points scored for price of tender under consideration

$P_t$  = Price of tender under consideration

$P_{max}$  = 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)
At least 51% Black ownership		10		
Less than 51% Black ownership		0		
At least 51% Black Women ownership		10		
Less than 51% Black Women ownership		0		

## 5. DECLARATION WITH REGARD TO COMPANY/FIRM

5.1 Name of company/firm.....

5.2 Company registration number: .....

5.3 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]

5.4 I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;

- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
  - (a) disqualify the person from the tendering process;
  - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
  - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
  - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
  - (e) forward the matter for criminal prosecution, if deemed necessary.

.....  
**SIGNATURE(S) OF TENDERER(S)**

**SURNAME AND NAME:** .....

**DATE:** .....

**ADDRESS:** .....

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