

BID DOCUMENT

RFQ NUMBER: **FIC/RFB/CONTENT EDITING SERVICES/14/2025/26**

ISSUE DATE: **20 JANUARY 2026**

CLOSING DATE: **10 FEBRUARY 2026**

TIME: **11H00**

DESCRIPTION: **THE FINANCIAL INTELLIGENCE CENTRE SEEKS TO APPOINT A SUITABLY QUALIFIED SERVICE PROVIDER TO DELIVER CONTENT EDITING, RESTRUCTURING, PROOFREADING AND FORMATTING SERVICES FOR A THREE-YEAR PERIOD.**

SUBMITTING BIDS: One (1) original and an electronic copy (*preferably on memory stick*) of the RFB document must be handed in / delivered to:
TENDER BOX
FINANCIAL INTELLIGENCE CENTRE
BYLSBRIDGE OFFICE PARK
CNR JEAN AVENUE & OLIVENHOUTBOSCH
HIGHVELD EXT 73 CENTURION
HIGHVELD
CENTURION

Bidders are required to request an access PIN code at least 24 hours prior to submitting their proposals by emailing Keneilwe.masemene@fic.gov.za and must present their identity document and/or valid driver's license at the main gate to gain access to the FIC offices.

CSD NUMBER:

DOCUMENTS IN THIS BID DOCUMENT PACK

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GLOSSARY OF TERMS

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PART A: SBD 1 INVITATION TO BID

| YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE FINANCIAL INTELLIGENCE CENTRE | | | | | |
|---|---|--|--|--|---------------------|
| BID NUMBER: | FIC/RFB/CONTENT EDITING SERVICES/13/2025/26 | | CLOSING DATE: | 10 FEBRUARY 2026 | CLOSING TIME: 11:00 |
| DESCRIPTION | THE FINANCIAL INTELLIGENCE CENTRE SEEKS TO APPOINT A SUITABLY QUALIFIED SERVICE PROVIDER TO DELIVER CONTENT EDITING, RESTRUCTURING, PROOFREADING AND FORMATTING SERVICES FOR A THREE-YEAR PERIOD. | | | | |
| BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT | | | | | |
| RECEPTION, FINANCIAL INTELLIGENCE CENTRE | | | | | |
| BYLS BRIDGE OFFICE PARK, CNR JEAN AVENUE & Olievenhoutbosch (13 Candela Street, Higveld Ext 73) | | | | | |
| BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO | | TECHNICAL ENQUIRIES MAY BE DIRECTED TO: | | | |
| CONTACT PERSON | Keneilwe Masemene | | CONTACT PERSON | Keneilwe Masemene | |
| TELEPHONE NUMBER | 012 641 6145 | | TELEPHONE NUMBER | 012 641 6145 | |
| FACSIMILE NUMBER | N/A | | FACSIMILE NUMBER | N/A | |
| E-MAIL ADDRESS | Keneilwe.masemene@fic.gov.za | | E-MAIL ADDRESS | Tenders@fic.gov.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: | | CENTRAL SUPPLIER DATABASE No: | MAAA | |
| B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE | TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No | | B-BBEE STATUS LEVEL SWORN AFFIDAVIT | [TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> 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? | <input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSURE PROOF] | ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED? | | <input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW] | |
| QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS | | | | | |
| IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? | | | <input type="checkbox"/> YES <input type="checkbox"/> NO | | |
| DOES THE ENTITY HAVE A BRANCH IN THE RSA? | | | <input type="checkbox"/> YES <input type="checkbox"/> NO | | |
| DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA? | | | <input type="checkbox"/> YES <input type="checkbox"/> NO | | |
| DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA? | | | <input type="checkbox"/> YES <input type="checkbox"/> NO | | |
| IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? | | | <input type="checkbox"/> YES <input type="checkbox"/> 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 (SBD 7). |
| 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:

PART C: SPECIAL CONDITIONS OF CONTRACT

In this document words in the singular also mean in the plural and vice versa and words in the masculine also mean in the feminine and neuter.

The General Conditions of Contract (GCC) will form part of this BID documents and may not be amended.

Special Conditions of Contract (SCC) relevant to this BID, compiled separately for this BID (if applicable) will supplement the General Conditions of Contract. Whenever there is a conflict, the provisions in the SCC shall prevail.

Copies of the GCC are available from the website

<https://www.treasury.gov.za/divisions/ocpo/sc/generalconditions/general%20conditions%20of%20contract.pdf>

SPECIAL CONDITIONS THAT THE BIDDER NEEDS TO TAKE NOTE OF:

1 FRAUD AND CORRUPTION

- 1.1 All service providers are to take note of the implications of contravening the Prevention and Combating of Corrupt Activities Act, Act No 12 of 2004 and any other Act applicable.

- 1.2 **Note:** Bidders should refrain from engaging with individuals who claim to represent the FIC and who offer to secure favourable outcomes of bids. Read this notice <https://www.fic.gov.za/2025/07/18/advisory-fic-procurement-process/> for more information.

2 NEGOTIATION

- 2.1 The Financial Intelligence Centre has the right to enter into negotiation with a prospective contractor regarding any terms and conditions, including price(s), of a proposed contract.

- 2.2 The Financial Intelligence Centre shall not be obliged to accept the lowest of any bid, offer or proposal in part or in whole.

- 2.3 All respondents will be informed whether they have been successful or not. A contract will only be deemed to be concluded when reduced to writing in a contract form signed by the designated responsible person of both parties. The designated responsible person of the Financial Intelligence Centre is the Supply Chain Manager or his/her written authorised delegate.

3 REASONS FOR REJECTION

- 3.1 The Financial Intelligence Centre shall reject a proposal for the award of a contract if the recommended bidder/tenderer has committed a proven corrupt or fraudulent act in competing for the particular contract.

- 3.2 The Financial Intelligence Centre may disregard the BID of any bidder/tenderer if that bidder/tenderer, or any of its directors:
 - 3.2.1 Have abused the SCM system of the Financial Intelligence Centre.
 - 3.2.2 Have committed proven fraud or any other improper conduct in relation to such a contract.
 - 3.2.3 Have failed to perform on any previous contract and the proof exists.

- 3.3 Such actions shall be communicated to the National Treasury.

4 PAYMENTS

The Financial Intelligence Centre (FIC) will pay the service provider the Fee as set out in the final contract. No additional amounts will be payable by the FIC to the Contractor.

- 4.1 The Contractor shall from time to time during the currency of the contract invoice The Financial Intelligence Centre for the services rendered. No payment will be made to the contractor unless an invoice complying with section 20 of the VAT Act No 89 of 1991 has been submitted to the FIC.

- 4.2 Payment shall be made into the bidder/tenderer's bank account normally 30 days after receipt of an acceptable, valid invoice. (Banking details must be submitted as soon as this BID is awarded).

- 4.3 The service provider shall be responsible for accounting to the appropriate authorities for its Income Tax, VAT or other amounts of money required to be paid in terms of applicable law.

5 PRESENTATION / DEMONSTRATION

The FIC reserves the right to request site visit/presentations/demonstrations from the short-listed bidder/tenderers if needed.

PART D: TERMS OF REFERENCE/MINIMUM SPECIFICATION FOR THE WORK

1. CONTENT EDITING

- 1.1 Edit, restructure, proofread and format communication content for grammar, style, punctuation, flow, structure and coherence.
- 1.2 The bidder must be able to edit content for editorials, features, thought leadership articles, opinion pieces, sector-specific editorials, technical and publicity material, informational pieces and guides, FIC special reports and publications, video scripts, manuals, brochures as well as other copy, as required.
- 1.3 The number of edited products is not fixed or predetermined and will depend on the budget available in relation to the fee structure of the bidder. As a general guideline, the anticipated number of products to be edited each year is as follows:

| Qty | Product | Average |
|------|--|-----------------|
| 1 | Annual report | 150 pages |
| 3-4 | FIC special reports and publications | 50 to 100 pages |
| 3-4 | Advertisorials | 800 words |
| 4-6 | Editorials, features, thought leadership articles, opinion pieces, sector-specific editorials thought pieces | 1 200 words |
| 8-10 | Video scripts | 250 words |
| 5-8 | Manuals | 20 pages |
| 4-6 | Brochure | 500 words |

2. GENERAL TOPICS

- 2.1 The communication product themes will include, but not be limited to: the broad legislative, compliance, analysis and operational aspects of the FIC's work; the mandate of the FIC and the environment in which it operates; money laundering and terrorist financing; the business sectors with which the FIC engages; the FIC's partners in business, law enforcement, government; the FIC's relationship with its financial intelligence unit peers; the organisation's areas of leadership, its role, function and purpose in fighting crime; the role of citizenry, business and others assisting in the fight against crime; maintenance of the safety and security of the financial system; the international anti-money laundering and combating of terror financing environment and related matters.

3. COMPETENCY OF THE BIDDER

- 3.1. The bidder is required to demonstrate proficiency in the English (South Africa) language, with knowledge of grammar, spelling, and punctuation.

- 3.2. The bidder should possess exceptional writing and editing skills, attention to detail, and the ability to enhance content clarity.
- 3.3. It is expected that the bidder will have read available material on the FIC to increase their understanding and familiarise themselves with the organisation and its target audiences, including previous annual reports and any other material published by the FIC.
- 3.4. The bidder is expected to also familiarise themselves with the language, tone, writing style and the content mix.
- 3.5. The bidder must have proven experience in compiling, writing, and editing content for the private or public sector, preferably in finance.
- 3.6. Draft content will be provided in MS Word and/or PDF (Adobe) format, with any financial data and figures presented in MS Excel tables. Therefore, it is essential that the editor and/or proofreader possess proficiency in these software applications.

4. DURATION OF THE CONTRACT

- 4.1. The agreement with the service provider shall remain in effect for the period of three years. Renewal of the contract over this period shall occur annually, based upon the availability of funds and the service provider's performance.

PART E: EVALUATION PROCESS

5. EVALUATION PROCESS

All bids duly lodged will be examined to determine compliance with bid requirements and conditions. Bids with obvious deviations from the requirements/ conditions will be eliminated from further evaluation.

6. PRE-SELECTION

- The Supply Chain Management business unit will conduct **pre-selection** on the following requirements:

| No | Item | Mandatory (Yes /No) | Requirement |
|----|---------------------------|------------------------|--|
| 1. | Central Supplier Database | Yes | Bidders must be registered on the Central Supplier Database (CSD) that can be accessed via National Treasury Website – www.csd.gov.za prior to submitting a bid. |

| | | | |
|----|---|-----|--|
| 2. | Valid B-BBEE Certificate or Sworn Affidavit. | No | Current/valid copy of a B-BBEE Certificate issued by SANAS Accredited BEE Verification Agencies OR A sworn affidavit as prescribed by the B-BBEE codes of good practice. Failure of a bidder to provide a valid B-BBEE certificate/sworn affidavit will forfeit points for specific goals. |
| 3. | Standard Bidding Document (SBD) 1 form - Invitation to Bid. | Yes | Failure to complete, sign and submit SBD 1 form will result in disqualification. |
| 4. | Standard Bidding Document (SBD) 4 form - Bidders Disclosure. | Yes | Failure to complete, sign and submit SBD 4 form will result in disqualification. |
| 5. | Standard Bidding Document (SBD) 6.1 - Preference Points Claim Form. | No | Failure to complete, sign and submit SBD 6.1 form will result in points being forfeited for specific goals. |
| 6. | Annexure A | Yes | Completed Annexure A (Table 1 and 2) as per format provided. A bidder that fails to complete the relevant information as per the Annexure will be disqualified. |
| 7. | Pricing schedule | Yes | Completed pricing schedule in accordance with the provided format in Annexure B . |

NOTE:

- A bidder who fails to comply with **mandatory** requirements No. **1, 3, 4 , 6 and 7** will be disqualified from the evaluation process.
- A bidder who fails to comply with mandatory requirement No. **2 and 5** will forfeit preference points for specific goals or B-BBEE points.

7. TECHNICAL EVALUATION

7.1 All remaining bids which have complied with the pre-selection criteria will be evaluated as follows:

7.1.1 Functionality will be done in terms of the evaluation criteria as set out below, whereby respondents who do not achieve the minimum score will be eliminated.

7.1.2 The minimum threshold to qualify for the next phase is 75 percent. Bidders who fail to meet the minimum threshold will be disqualified and will not be evaluated further for price and specific goals in terms of B-BBEE status level of contribution.

7.1.3 The table below explains the rating guideline for the evaluation of functionality criteria.

| No | Criteria | Weight |
|--------------|--|------------|
| 1 | <p>Highlight experience</p> <p>Bidder to provide samples produced in the past five years in an electronic format (E.g. online links and/or e-mail):</p> <p>a) <u>Three samples</u> of annual reports, or similar, produced for the financial sector (private and/or public) which was edited and proofread.</p> <p>b) <u>Three samples</u> of editorials, or similar, produced for the financial sector (private and/or public) which was edited and proofread.</p> | 10 |
| | | 10 |
| 2 | <p>Content development</p> <p>Showcase the ability to edit and proofread content of the samples provided by addressing:</p> <ul style="list-style-type: none"> • Focus: The copy should have a clear central idea, which is carried throughout the sample • Flow: Copy should support the main topic or theme • Structure: Correct and consistent use of appropriate tone, punctuation, spelling, grammar etc. • Correctness: The copy to be written in appropriate and error-free English. | 50 |
| 3 | <p>Experience of the editor(s) and/or proofreader(s)</p> <p>At least <u>10 years of experience</u> is required for the editing and proofreading of annual reports or similar reports and editorial or similar products.</p> <p>Note: Bidders to complete table 1 under annexure A for ease of access to this information. Indicate if the resource i.e. the editor and/or proofreader will be the same person.</p> | 20 |
| 4 | <p>Track record</p> <p>The bidder to provide client references from six separate clients in the financial sector (private and/or public):</p> <p>a) <u>Three contactable client references</u> where annual reports or similar reports were edited and proofread.</p> <p>b) <u>Three contactable client references</u> where editorial or similar products were edited and proofread.</p> <p>Note: Bidders to complete table 2 under annexure A for ease of access to this information.</p> | 10 |
| TOTAL | | 100 |

7.1.4 Table below explains the rating guideline for the evaluation:

| CRITERIA DESCRIPTION | Points = 0 | Points = 1 | Points = 2 | Points = 3 | Points = 4 | Points = 5 |
|---|---|------------|------------|------------|------------|--|
| 1. Showcase experience Service provider to provide samples produced in the past five years: a) Three samples of annual reports, or similar, produced for the financial sector (private and/or public sector) which was edited and proofread. | No or less than three samples provided | n/a | n/a | n/a | n/a | a) Three annual report or similar samples provided |
| b) Three samples of editorials, or similar, produced for the financial sector (private and/or public sector) which was edited and proofread | No or less than three samples provided | n/a | n/a | n/a | n/a | b) Three samples of editorials or similar provided |
| 2. Content development Assessment of the ability to edit and proofread content of the samples provided must address: <ul style="list-style-type: none">Focus: The copy should have a clear central idea, which is carried throughout the sampleFlow: Copy should support the main topic/themeStructure: Correct and consistent use of appropriate tone, punctuation, spelling, grammarCorrectness: The copy to be written in appropriate and error-free English | None of the requirements are addressed | n/a | n/a | n/a | n/a | All six samples provided address the following requirements: Focus, flow, structure, correctness |
| 3. Experience of the editor(s) and/or proofreader(s) At least <u>10 years of experience</u> is required for the editing and proofreading of annual reports or similar reports and editorial or similar products. Note: Bidders to complete table 1 under annexure A for ease of access to this information. Indicate if the resource i.e. the editor and/or proofreader will be the same person | Table 1 not completed or incomplete or less than 10 years' experience | n/a | n/a | n/a | n/a | 10 and more years' experience |
| 4. Track record The bidder to provide client references from six separate clients in the financial sector (private and/or public): a) <u>Three contactable client references</u> where annual reports or similar reports were edited and proofread. b) <u>Three contactable client references</u> where editorial or similar products were edited and proofread. Note: Bidders to complete table 2 under annexure A for ease of access to this information. | No references provided or less than six provided | n/a | n/a | n/a | n/a | Six contactable references provided where editing and proofreading services have been conducted |

ANNEXURE A

TABLE 1: EXPERIENCE OF THE EDITING AND/OR PROOFREADING

Indicate if the resource i.e. the editor and/or proofreader will be the same person

| Name and surname | Years' of experience in editing | Years' of experience in proofreading |
|------------------|---------------------------------|--------------------------------------|
| | | |
| | | |
| | | |
| | | |
| | | |

TABLE 2: TRACK RECORD

List **six** references (clients):

- Three contactable client references where **annual reports or similar reports** were edited and proofread
- Three contactable client references where **editorial or similar products** were edited and proofread.

| Client (Company/Organisation) Name | Client (Company/Organisation) Contact Number | Client (Company/Organisation) Contact Person | Product Edited and/or Proofread | Year in which service was delivered |
|------------------------------------|--|--|---------------------------------|-------------------------------------|
| 1. | | | | |
| 2. | | | | |
| 3. | | | | |
| 4. | | | | |
| 5. | | | | |
| 6. | | | | |

ANNEXURE B

8. PRICING SCHEDULE

- a. All prices must be VAT inclusive and must be quoted in South African Rand, the quoted prices are for budget purposes only and not for award.
- b. Provide a cost estimate for the line items listed in the table. This information will be used solely for comparison purposes.

| Service | Unit Cost for Year 1 incl.VAT | Unit Cost for Year 2 incl.VAT | Unit Cost for Year 3 incl.VAT |
|--|----------------------------------|----------------------------------|----------------------------------|
| Heavy copy editing: Cost per word | R | R | R |
| Substantial or structural editing: Cost per word | R | R | R |
| Heavy copy editing: Annual report of 40 000 words | R | R | R |
| Heavy copy editing: Editorial of 1 000 words | R | R | R |
| Proofreading: Cost per word | R | R | R |
| Proofreading: Annual report of 40 000 words | R | R | R |
| Proofreading: Editorial of 1 000 words | R | R | R |
| Other costs Example sundry, admin, management | | | |
| | R | R | R |
| | R | R | R |
| | R | R | R |
| ESTIMATED TOTAL COST PER YEAR INCL VAT | R | R | R |
| ESTIMATED TOTAL COST FOR 36 MONTHS INCL VAT | R | | |

9. VALIDITY PERIOD OF PROPOSAL

- 9.1 Validity period from date of closure is 90 days.
- 9.2 Offer provided on this document will be valid for the duration of the contract entered into with the successful bidder.
- 9.3 Bidders may be requested to extend their validity period of their proposal for a specified additional period. In such instances, bidders will not be allowed to change any aspect of their tender, unless they are able to demonstrate that the proposed change(s) is as a direct and unavoidable consequence of FIC's extension of the validity period.

PART F: STANDARD BIDDING DOCUMENTS OVERLEAF

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

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.

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 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

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.

SBD4

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

**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 system is applicable to invitations to this tender:
 - the 80/20 system for requirements with a Rand value of up to 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 shall be awarded for:
 - (a) Price; and
 - (b) Specific Goals.
- 1.4 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 FIC requires of a tenderer to substantiate any claim in regards to preferences, by submitting their current/valid B-BBEE certificate or a sworn affidavit as prescribed by the B-BBEE codes of good practice.

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) “**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 PREFERENCE POINT SYSTEMS

A maximum of 80/20 points is allocated for price on the following basis:

80/20

$$Ps = 80 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

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 2022, 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 that shall be supported by proof / documentation as stated in the conditions of this tender:

Table 1: Specific goals for the tender and points claimed are indicated per the table below.

Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)

| The specific goals allocated points in terms of this tender | Number of points allocated (80/20 system) (To be completed by the organ of state) | Number of points claimed (80/20 system) (To be completed by the tenderer) |
|--|--|--|
| The B-BBEE Certificate is used as a measurement instrument for FIC's specific goals: | 20 Maximum | |
| B-BBEE Status level of contributor: 1 | 20 | |
| B-BBEE Status level of contributor: 2 | 18 | |
| B-BBEE Status level of contributor: 3 | 14 | |
| B-BBEE Status level of contributor: 4 | 7 | |
| B-BBEE Status level of contributor: 5 | 4 | |
| B-BBEE Status level of contributor: 6 | 2 | |
| B-BBEE Status level 7 – 8 and non-compliant contributors | 0 | |

DECLARATION WITH REGARD TO COMPANY/FIRM

4.2. Name of company/firm.....

4.3. Company registration number:

4.4. TYPE OF COMPANY/ FIRM

Partnership/Joint Venture / Consortium
 One-person business/sole property
 Close corporation
 Public Company
 Personal Liability Company
 (Pty) Limited
 Non-Profit Company
 State Owned Company
[TICK APPLICABLE BOX]

4.5. 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: