

Reference Number	IZIKO-POS-RFQ 12/25
Description	TENDER BRIEF FOR SERVICE PROVIDER TO LEASE, IMPLEMENT, COMMISSION AND PROVIDE AD-HOC SUPPORT FOR POINT OF SALE SYSTEM FOR IZIKO MUSEUMS FOR A PERIOD OF THIRTY SIX (36) MONTHS STARTING 01 APRIL 2026
Name of the responsible unit/department	Customer Services
Address	25 Queen Victoria Street Cape Town 8001
Attention	Ronell Pedro (CFO)
Issued Date	15 December 2025
Closing date and time for submission	23 January 2026 Time 11:00 am
Method of delivery	Proposals, and accompanying documentation, must be placed in tender box at Iziko South African Museum, 25 Queen Victoria Street Cape Town 8001 Bidders to submit an original document plus two (2) copies of the original document, of which one must be in soft copy format (memory stick)
Tender box dimensions	(h) 90mm x (l) 400mm x (w) 900mm
Supply Chain Management Department contact details	Siphamandla Oupa (SCM) 021 481 3889 soupa@iziko.org.za & ndonson@iziko.org.za
TENDERER	
Name of Company	
Trading as (if different from above)	
CSD Supplier Number (MA.....Number)	
B-BBEE Status Level of Contribution	
Quote Price (Incl Vat)	
Signature	

1. BACKGROUND

Iziko Museums of South Africa ("Iziko") is a Schedule 3A public entity and non-profit organisation, partly subsidised by the National Department of Sport, Arts & Culture (DSAC). Iziko consists of 12 national museums and a Social History Centre located across the Western Cape under a unified governance structure. Iziko was established in terms of the Cultural Institutions Act, 1998 (Act No. 119 of 1998) and adheres to the Public Finance Management Act (PFMA), 1999 (Act No. 1 of 1999) and its associated regulations.

2. OVERVIEW

Iziko invites suitably qualified and experienced service providers to supply, install, customise, integrate, and lease a modern, centrally managed POS and Ticketing System for **36 months**, commencing **1 April 2026**.

The solution must support:

- POS terminals
- Digital self-service kiosks
- Mobile POS kiosks
- Online ticketing
- Real-time central back-office management
- Integration with Sage 300 (Accpac) accounting
- POPIA & PCI-DSS compliance
- Customisable and scalable functionality

3. PROJECT BRIEF

The appointed service provider will lease, implement, configure, customise, and support a full POS ecosystem for all Iziko sites listed below. The lease must cover **all hardware, software, accessories, implementation, training, and support** for the full 36-month period.

Included Services

- Hardware, kiosks, peripherals
 - Software configuration & management
 - Installation at all end-user sites
 - Customisation of off-the-shelf software to Iziko requirements (no additional cost)
 - Initial and ongoing training
 - Full support & maintenance (including emergency support, 7 days/week, 08:00–17:00)
 - Central back-office system for reporting, monitoring, configuration, and administration
-

Table 1: Sites & Number of POS / Kiosk Units Required

No.	Iziko Building	Address	Required Units
1	Iziko South African Museum & Planetarium	25 Queen Victoria Street, Cape Town	3 POS + 1 Mobile Kiosk + Self-Help Kiosks
2	Iziko South African National Gallery	80 St Johns Rd, Cape Town	1 POS
3	Iziko Slave Lodge	Cnr Adderley & Wale Street	1 POS
4	Iziko Bo-Kaap Museum	71 Whale Street, Cape Town	1 POS
5	Iziko Bertram House	39 Orange Street, Cape Town	1 POS
6	Iziko Old Town House	Greenmarket Square, Cape Town	1 POS
7	Iziko Rust & Vreugd	78 Buitenkant Street, Cape Town	1 POS
8	Nelson Mandela Prison (Drakenstein)	R301, Paarl	1 POS

4. SCOPE OF WORK

The bidder must provide a comprehensive solution including:

- Supply, installation, and configuration of POS hardware and software
- Implementation of kiosk systems (self-help and mobile)
- Customisation of reports and system functionality to Iziko's operations
- Integration with Sage 300, (Accpac), where possible
- 36-month technical support, maintenance, and updates
- Staff training and operational handover
- System uptime, monitoring, and secure payment processing

5. SYSTEM & TECHNICAL REQUIREMENTS

5.1 Hardware Requirements

- POS terminals
- Cash drawers, receipt printers, barcode/QR scanners
- Touchscreen devices
- Mobile POS units
- Card payment terminals (contactless, chip & PIN, NFC)
- Self-help kiosks
- Ruggedised devices suitable for high visitor footfall

5.2 Software Requirements

- POS application (Windows/Android compatible)
- Cloud-based or hybrid back-office system
- Integration with Sage 300 Accounting
- Real-time reporting
- Ticketing module supporting multiple ticket types, discounts, group bookings
- Online ticketing with Iziko branding
- Scanning & validation via handheld, kiosk, and mobile POS
- Customisable workflows and forms
- POPIA-compliant data processing
- Payment Card Industry and Data Security Standard- must be compliant and secure card payments

5.3 Networking Requirements

- LAN/Wi-Fi connectivity

numbers report

- **Accounting-system-ready daily batch files** per site with rand values for Sage integration

6. IMPLEMENTATION & MIGRATION REQUIREMENTS

The bidder must provide:

- Migration plan (data, system configuration, legacy system cut-over)
- Implementation methodology (milestones, timeline, critical path)
- Training approach for users and administrators
- Change management plan
- Pilot deployment and final cut-over plan

7. TRAINING REQUIREMENTS

- End-user operational training
- Administrator / ICT training
- Training for updates and enhancements
- Training material, manuals, and guides

8. SUPPORT & MAINTENANCE (36 Months)

- 24/7 support for critical issues
- Remote & onsite support
- Hardware swap-out
- Software updates, patches, security fixes
- Data backup and recovery
- Monitoring & system diagnostics
- Incident management and escalation

9. PRESENTATION

Bidders will be required to make a presentation to the Bid Evaluation and Bid Adjudication Committees at the South African Museum situated at 25 Queen Victoria Street, Cape Town at a date advised.

10. REQUIREMENTS

The bidding requirements and stages are summarised in the table below:

Table : 2 Bidding Stages

Stage 1 – Administrative Documents requirements	Stage 2 - Functionality Criteria		Stage 3 - Price and Specific Goals
Bidders must submit all documents as outlined in Table 3 - Administrative Returnable Documents below.	<p>Bidders are required to achieve a minimum of 70% on functionality criteria, which includes a presentation, in table 6 to proceed to stage 3 (price and specific goals)</p> <p>Minimum 70% required in Table 6</p> <p>Refer to Table 5 – Required documents to enable functionality scoring.</p> <p>Specifications will be posted on the Iziko website - http://www.iziko.org.za/static/page/tenders</p>		<p>Bidders that meet the minimum threshold for functionality will be evaluated for Price & Preferential Procurement Specific Goals Evaluation Criteria refer to Table 8</p> <p>Price – 80 points Specific Goals– 20 points</p> <p>Note: Price and quality of work/product are important factors as it ensures optimum value for money and total cost to Iziko and should cover all goods and services to be delivered to the best standard possible for specified products and assembly methods.</p>

Note: Failure to supply any of the administrative documents stipulated below may lead to disqualification

11. Table 3: Administrative Documents

Order	Administrative Documents
1.	Index confirming all contents
2.	Cover letter confirming acceptance of the invitation and acknowledgement of Iziko's requirements
3.	Central Supplier Database Report – with supplier number and company details (www.csd.gov.za) and Tax Status Verification Pin together with tax registration number
4.	Detailed pricing structure: A cost schedule detailing full cost breakdown, inclusive of VAT, any disbursement and escalations, if applicable, etc. for the entire duration of the proposed contract must be provided
5.	A Valid B-BBEE Certificate or Sworn Affidavit to determine the Service provider's status level
6.	Completed SBD 1 - Invitation to Bid
7.	Completed SBD 4 – Bidder's Disclosure
8.	Completed SBD 6.1 - Preference Points Claim Form (Preferential Procurement Regulations 2022)
9.	Completed Confidentiality and Non-Disclosure Agreement (Annexure B)
10.	Annexure C Signed General Conditions of Contract

12. STAGE 2 : FUNCTIONALITY CRITERIA

Required Documents for Functionality

Bidders must submit all documents listed below. These documents will be used to evaluate functionality.

Failure to submit any required document will result in **non-compliance** and may lead to disqualification.

Table 5: Required Documents for Functionality

	The functionality submission must include:
1.	Company Profile and References (minimum 5 similar projects)
2.	Proposal with description and specifications of equipment used at the front of house ticket counters, kiosks and mobile points.
3.	Details of ticket types and pricing rules for free days, refunds, overrides and approvals.
4.	Details and examples of daily sales, cash vs card, cashier reports and audit trails.
5.	High-level implementation plan and training approach for front-of-house staff, supervisors and finance.
6.	Details of the support model, response times, local presence, uptime commitment:
7.	Presentation (to be delivered if shortlisted)

Functionality Evaluation and Threshold

Bidders will be evaluated on functionality based on two components:

- Functionality Evaluation Score (out of 100 points), and
- Presentation Evaluation Score (out of 100 points).

The Presentation Evaluation Score will carry a weighting of 30%, and the Functionality Evaluation Score will carry a weighting of 70%.

The weighted scores will be combined to determine a Total Functionality Score out of 70 points, calculated as follows:

$$\text{Total Functionality Score} = (\text{Functionality Evaluation Score} \times 70\%) + (\text{Presentation Evaluation Score} \times 30\%)$$

Bidders are required to achieve a minimum of 70% (i.e. 49 out of 70 points) on the Total Functionality Score, as reflected in Table 6, in order to proceed to Stage 3: Price and Specific Goals Evaluation.

Bidders who fail to meet the minimum functionality threshold will be disqualified from further evaluation.

13. FUNCTIONALITY EVALUATION CRITERIA (100 Points Total)

Minimum threshold to proceed to Pricing Evaluation: 70/100

Table 6

No.	Evaluation Criteria	Evidence Required (Mandatory)	Score
1	Company Profile and track record (Similar Projects)	Company profile and a list of five projects of similar scope within last 5 years, which includes project description and value, duration, client reference details. • 1. 5 or more = 10 pts 2. 4 = 8 pts 3. 3=6 pts 4. 2 = 4 pts 0=0 points	Max=10
2	Suitability of POS terminals, kiosks and mobile devices in a busy, public museum environment.	Evidence required: Proposal with description and specifications of equipment used at the front of house ticket counters, kiosks and mobile points. Scoring: 1. Clearly suited for high-volume, multi-site museum use = 30 2. Generally suitable with minor limitations = 20 3. Partially suitable / adapted retail solution = 10 4. Not suitable or unclear = 0	Max=30
3	POS functionality for ticketing & visitor management	Evidence required: Details of ticket types and pricing rules for free days, refunds, overrides and approvals. Scoring: 1. Fully supports all required functions = 25 2. Supports most functions with workarounds = 15 3. Basic ticketing only = 5 4. Significant gaps = 0	Max=25
4	Ability of the system to support sound financial control and audit readiness.	Evidence required: Details and examples of daily sales, cash vs card, cashier reports and audit trails. Scoring: 1. Strong controls and usable reports = 15 2. Adequate controls with manual intervention = 10 3. Weak or limited controls = 5 4. No clear evidence = 0	Max=15
5	Training and operational handover capable of being implemented without disrupting visitors	Evidence required: High-level implementation plan and training approach for front-of-house staff, supervisors and finance. 1. Clear, practical museum-specific approach = 10 2. General approach = 5 3. Unclear or unrealistic = 0	Max=10
6	Support, reliability and maintenance	Evidence required: Details of the support model, response times, local presence, uptime commitment:	Max=10

14. PRESENTATION

Bidders who score above 70 points for functionality will be shortlisted and required to make a 40-minute presentation to the Bid Evaluation and Bid Adjudication Committees at the South African Museum situated at 25 Queen Victoria Street, Cape Town at a date advised.

Table 7: Presentation Criteria

No.	Evaluation Area	Evaluation Criteria	Max Points
1	Overview of the POS solution	Effectiveness of proposed system functioning in Iziko's environment	30
2	POS hardware, kiosks and mobile devices	Demonstration of suitability of hardware(counter POS, kiosks, mobile POS)	20
3	System Functioning (POS Software)	Ticket types, pricing rules, free days, refunds, overrides, and approvals	15
4	Reports and financial controls	Key sales, cash-up, reconciliation and audit reports	10
5	Integration with Sage 300	How sales data moves from the POS to Sage 300	5
6	Security, uptime and payments	How payments are secured, system uptime ensured, and data protected	10
7	Implementation, training and handover	How the system will be rolled out and staff trained.	5
8	Support and maintenance (36 months)	How support works, response times, and local presence	5
Total			100 Points

15. Stage 3 – PRICE AND SPECIFIC GOALS ALLOCATED POINTS

Awarding of Preference Points

Proposals that meet the minimum stipulated threshold for functionality criteria will be evaluated based on preference points as described in the Preference Point System stipulated in the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000). The criteria for apportioned and weighted preference points for this tender are as per the tables below:

Table 8: Price & Preferential Procurement Specific Goals Evaluation Criteria

Preference Point Criteria		Points Allocation
1.	Price	80
2.	Specific Goals allocated Points	20
Total Points		100

Price

The pricing should be inclusive of VAT, with a clear indication of the total cost before and after VAT. Bidders must ensure that their pricing accounts for any adjustments or revisions that may arise during the project.

Pricing Schedule:

Bidders are required to provide a detailed pricing structure for the project by completing the pricing schedules, Annexure A, below.

SPECIFIC GOALS

As indicated in Table 8, the Preference Claim Form (SBD 6.1) must form part of all bids submitted, in terms of the Preferential Procurement Regulations of 2022. This form serves as a claim form for preference points for Specific Goals contribution. The points are allocated as follows:

SPECIFIC GOALS ALLOCATED POINTS	Number of points allocated (80/20 system)	Number of points claimed. (80/20 system) (To be completed by the tenderer)
Proof of B-BBEE certificate; Company Registration Certification Identification Documentation. CSD report Ownership by HDIs (Who had no franchise on national elections before the 1983 and 1993 constitution) 50% or more black ownership = 20 points Less than 50% black ownership = 10 points 0% black ownership = 0 points	20	
TOTAL POINTS	20	

16. Validity Period

Offer to be valid for 180 days from the bid closing date.

17. SUMMARY OF GENERAL PRINCIPLES

- Iziko will apply the 80/20 preferential points system.

accept changes to a proposal from a successful bidder at any time, as long as it complies with legal and administrative requirements

- Iziko reserves the right to request the administrative returnable documents after the closing date and time, in instances where the Bidder has not returned the documents. However, the Iziko is under no obligation to request such documents or information and may elect to disqualify the Bidder that has not returned the requisite document.
- There will be no discussions with any bidder until a final decision has been taken by the Bid Adjudication Committee. Any subsequent discussions shall be at the discretion of Iziko.

18. REASONS FOR DISQUALIFICATION

Iziko may disqualify any proposal for any one or more of the following reasons:

- a bidder submits a proposal late;
- a bidder submits a proposal via facsimile or e-mail;
- a bidder does not submit required documents;
- a bidder submits incomplete documentation and/or information as per the requirements;
- a bidder submits information which is fraudulent, factually untrue, or inaccurate.

Any such disqualification may take place without prior notice to the applicable bidder.

19. FORMAL CONTRACT

The proposal and appended documentation, all completed and read together, form the basis for a formal agreement to be negotiated and concluded in a formal contract between Iziko and the preferred bidder. Point of Sale contract will also be attached.

A mere offer and acceptance shall not constitute a formal contract of any nature for any purpose between Iziko and the preferred bidder.



MS RONELL PEDRO
CHIEF FINANCIAL OFFICER

____ **15 DECEMBER 2025** _____
DATE



MR LENNOX TUKWAYO
CHIEF EXECUTIVE OFFICER

____ **15 DECEMBER 2025** _____
DATE

ANNEXURE A : PRICING SCHEDULES:

Table 9 – PRICING SUMMARY

Description	Amount (VAT Incl.)
Year 1 (Implementation & Customisation)	
Year 1 (Training)	
Year 1 (Lease + Implementation + Support)	R
Year 2 (Lease + Support + Maintenance)	R
Year 3 (Lease + Support + Maintenance)	R
TOTAL 3-YEAR COST	R
Ad Hoc Customisation (rate per hour)	

• 5.2 Detailed Pricing Breakdown

A. Software & Licensing (Including Lease)

Table 10

No.	Software Component	Qty	Unit Cost	Total (VAT Incl.)	Year 1	Year 2	Year 3
1	POS Software (per terminal)						
2	Central Back-Office System						
3	Online Ticketing Module						
4	Self-Help Kiosk Software						
5	Mobile POS Software						
6	Sage Accounting Integration						
	TOTAL SOFTWARE COST						

B. Hardware (Leased for 36 Months)

Table 11

No.	Hardware Component	Qty	Lease Cost / Month	36-Month Total	Year 1	Year 2	Year 3
1	POS Terminals						
2	Receipt Printers						
3	Barcode/QR Scanners						
4	Self-Help Kiosks						
5	Mobile POS Devices						
6	Card Machines						
	TOTAL HARDWARE LEASE COST						

C. Implementation & Customisation

Table 12

No.	Component	Qty / Hours	Unit Rate	Total (VAT Incl.)
1	Installation & Deployment			
2	Configuration & Setup			
3	Customisation (Iziko Requirements)			
4	Website Integration & Branding			

D. Maintenance and Support

Table 13

No.	Component	Qty	Unit Cost	Total (VAT Incl.)	Year 1	Year 2	Year 3
1							
2							
3							
4							
5							
6							

E. Ad Hoc Customisation

Table 14

No.	Component	Qty	Hourly Rate	Total (VAT Incl.)	Year 1	Year 2	Year 3

13. BIDDER CERTIFICATION

I hereby certify that:

- All costs are fully inclusive and fixed for 36 months.
- 20. No additional charges will apply beyond the pricing schedule.
- The bidder can fully deliver the required a POS & ticketing solution.

Name: _____

Signature: _____

Date: _____

PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)					
BID NUMBER:	REF: -Iiko-POS-RFQ-12/25	CLOSING DATE:	06 February 2026	CLOSING TIME:	11:00
DESCRIPTION					
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
Iziko South African Museums					
25 Queen Victoria Street					
Cape Town					
8001					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Siphamandla Oupa		CONTACT PERSON	Wendy Black	
TELEPHONE NUMBER	021 481 3889		TELEPHONE NUMBER	021 281 3988	
FACSIMILE NUMBER			FACSIMILE NUMBER		
E-MAIL ADDRESS	soupa@iziko.org.za		E-MAIL ADDRESS	wblack@iziko.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
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> [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, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.

2. TAX COMPLIANCE REQUIREMENTS

- 2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
- 2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
- 2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
- 2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
- 2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
- 2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
- 2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

SIGNATURE OF BIDDER:

.....

CAPACITY UNDER WHICH THIS BID IS SIGNED:

.....

(Proof of authority must be submitted e.g. company resolution)

DATE:

.....

BIDDER'S DISCLOSURE**1. PURPOSE OF THE FORM**

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise, employed by the state? **YES/NO**

2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of 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

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.

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

3.1 I have read, and I understand the contents of this disclosure;

3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;

3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.

3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.

3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder (Company Name)

² Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 To be completed by the organ of state

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:

$$\begin{array}{ccc} \text{80/20} & \text{or} & \text{90/10} \\ P = \left(- \frac{P_s - P_t}{P_{\min}} \right) & \text{or} & P = \left(- \frac{P_s - P_t}{P_{\min}} \right) \end{array}$$

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:

$$\begin{array}{ccc} \text{80/20} & \text{or} & \text{90/10} \\ P = \left(+ \frac{P_s - P_{\max}}{P_{\max}} \right) & \text{or} & P = \left(+ \frac{P_s - P_{\max}}{P_{\max}} \right) \end{array}$$

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	Evidence	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)
Persons, or categories of persons, historically disadvantaged- (HDI) by unfair discrimination on the basis of	<ul style="list-style-type: none"> • Proof of B-BBEE certificate; • Company Registration Certification • Copies of Shareholders IDs 		
Race: Black persons (ownership)* 50% or more black ownership = 20 points Less than 50% black ownership = 10 points 0% black ownership = 0 points			

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 to –
 - (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:**