



SCM Division  
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Johannesburg  
Private Bag X1  
Auckland Park 2006

### REQUEST FOR QUOTATION (RFQ)

RFQ	RFQ/FIN/2025/10245653/03
RFQ ISSUE DATE	16 January 2025
RFQ DESCRIPTION	APPOINTMENT OF A SUITABLE SERVICE PRVIDER TO IMPLEMENT FINANCIAL REPORTING DASHBAORD AND SALES FOREASTING AND BUDGETING MODEL FOR A PERIOD OF TWELVE MONTHS
BRIEFING SESSION/ SITE INSPECTION	N/A
CLOSING DATE & TIME	27 January 2025 @12h00

Submissions must be electronically emailed to [RFQSubmissions@sabc.co.za](mailto:RFQSubmissions@sabc.co.za) on or before the closing date of this RFQ.

For queries, please contact **Nyandano Nemukula** via email: [Tenderqueries@sabc.co.za](mailto:Tenderqueries@sabc.co.za)

The SABC requests your quotation on the services listed above. Please furnish us with all the information as requested and return your quotation on the date and time stipulated above. Late and incomplete submissions will invalidate the quote submitted.

SUPPLIER NAME: \_\_\_\_\_

POSTAL ADDRESS: \_\_\_\_\_

TELEPHONE NO: \_\_\_\_\_

FAX NO. : \_\_\_\_\_

E MAIL ADDRESS: \_\_\_\_\_

CONTACT PERSON: \_\_\_\_\_

CELL NO: \_\_\_\_\_

SIGNATURE OF BIDDER: \_\_\_\_\_

RFQ/MASTER/2024-1

## NOTES ON QUOTATIONS AND PROPOSALS SUBMISSION

1. All electronic submissions must be submitted in a **PDF** format that is protected from any modifications, deletions, or additions.
2. Financial/pricing information must be presented in a **separate** attachment from the Technical / Functional Response information.
3. The onus is on the Bidder to further ensure that all mandatory and required documents are included in the electronic submission.
4. All submissions should be prominently marked with the following details in the email subject line:
  - **RFQ Number and bidders' name.**
5. Bidders are advised to email electronic submissions at least thirty minutes before the bid closing time to cater for any possible delay in transmission or receipt of the bid. The onus is on bidder to ensure that the bid is submitted on time via email
6. Tender submission emails received after submission date and time will be considered late bid submissions and will not be accepted for consideration by SABC.
7. SABC will not be responsible for any failure or delay in the email transmission or receipt of the email including but not limited to:
  - receipt of incomplete bid
  - file size
  - delay in transmission receipt of the bid
  - failure of the Bidder to properly identify the bid
  - illegibility of the bid; or
  - Security of the bid data.

**NB: THE BIDDER SHOULD ENSURE THAT LINKS FOR WETRANSFER AND GOOGLE DROP BOX EXPIRE AFTER 30 DAYS OF THEIR SUBMISSIONS INSTEAD OF SEVEN DAYS**

## 1. FIRST PHASE – MANDATORY DOCUMENTS

All bid respondents must submit mandatory documents that comply with all mandatory requirements. Bids that do not fully comply with the mandatory requirements will be disqualified and will not be considered for further evaluation.

MANDATORY REQUIREMENT		Bidder to indicate compliance	
Description		Yes or no	Supporting evidence (refer to page number or Annexure)
1.1	The bidder must have a local support office in Gauteng, South Africa. Provide physical address of the Gauteng office. <b>A utility bill, such as water, electricity etc or</b> A copy of a signed lease agreement (by both parties),		

**NON-SUBMISSION OF THE MANDATORY DOCUMENTS WILL RESULT IN AUTOMATIC DISQUALIFICATION.**

## 2. REQUIRED DOCUMENTS

- 2.1 Submit proof Central Supplier Database (CSD) registration
- 2.2 Proof of Valid TV License Statement for the Company; all active Directors and Shareholder must have valid TV Licenses.
- 2.3 (Verification will also be done by the SABC internally).
- 2.4 Valid Tax Clearance Certificate or SARS "Pin" to validate supplier's tax matters
- 2.5 Original or Certified copy of Valid BBBEE Certificate (from SANAS accredited Verification Agency)
- 2.6 Certified copy of Company Registration Document that reflect Company Name, Registration number, date of registration and active Directors or Members.
- 2.7 Certified copy of Shareholders' certificates.
- 2.8 Certified copy of ID documents of the Directors or Members.

**NB: NO CONTRACT WILL BE AWARDED TO ANY BIDDERS WHO'S TAX MATTERS ARE NOT IN ORDER.**

**NO CONTRACT WILL BE AWARDED TO ANY BIDDERS WHO'S TV LICENCE STATEMENT ACCOUNT IS NOT VALID.**

**NO CONTRACT WILL BE AWARDED TO ANY BIDDER WHO IS NOT REGISTERED ON THE CSD**

### 3. BACKGROUND

Group Finance has started reporting the financial performance of the SABC using dashboards that are prepared on excel. This has allowed for better data analytics and understanding of the financial performance and reporting of the SABC. Excel dashboards are a significant tool to use, however, they are not real time and are time consuming to develop. Therefore, the need to automate and have a model or software that will assist Group Finance in producing real time analysis of the performance of the SABC as requested and not only once a month at reporting date.

This will also allow for information to be readily available to the Executive Committee to expedite decision making regarding the performance of the SABC. During budget season, Group Finance has faced significant challenges in obtain reasonable budgets from Sales as the budgets are not informed by current performance. Group Finance has also struggled to get the quarterly forecasts from Sales as required by the Budget Management Policy. A separate budgeting and forecasting tool will assist the SABC in ensuring that timely and accurate budgets and forecasts are prepared for Sales as and when requested and the assumptions supporting the budgets and forecasts are adequately documented.

### 4. REQUIREMENTS AND SCOPE OF SERVICES

#### 4.1 CFO Dashboard requirements: Financial Performance Metrics:

- Revenue and expenditure tracking (including profitability ratios).
- Profit and loss statements.
- Balance sheet reporting.
- Cash flow analysis – cash collections and cash forecasts.
- Budget vs. actuals vs prior periods vs projections.
- Financial forecasts and projections.
- Working capital ratios (debtors & creditors days, liquidity ratios)
- Key liabilities or creditors
- Programme profitability analysis – CVPRM model & recommendations

#### 4.2 Compliance and Risk Management:

- Regulatory compliance status.
- Risk assessment and mitigation plans.
- Audit trails and reports.

#### **4.3 Cost Management:**

- Cost breakdown by department and project.
- Cost-saving opportunities.
- Vendor and contract management.
- Supplier spend analysis and forecasts.

#### **4.4 Investment Analysis:**

- ROI on current investments.
- CAPEX analysis, current spending, forecasted spending, available funding, funding shortfall or surplus
- Potential investment opportunities.
- Asset management.

#### **4.5 Integration with Financial Systems:**

- Real-time data integration from ERP systems.
- Automated data updates and reporting.

### **5 CEO Dashboard Requirements**

#### **5.1 Strategic Performance Metrics:**

- Key performance indicators (KPIs) aligned with strategic goals and Corporate Plan targets.
- Market share and competitive analysis (Revenue & audience).
- Audience reach and engagement metrics.
- Summary cash position

#### **5.2 Content Performance and Insights:**

- Viewership and listenership statistics.
- Content performance by channel and program.
- Audience demographics and preferences.

#### **5.3 Operational Efficiency:**

- Project status and timelines.
- Resource allocation and utilization.
- Employee performance and productivity.

#### **5.4 Market Comparisons:**

- Summary of key sales metrics
- Benchmarking against industry standards.
- Competitor analysis.
- Trends and opportunities in the broadcasting industry.

- Performance exceptions – highs and lows

### **5.5 Integration with Business Systems:**

- Data from CRM, HR, and other business systems.
- Real-time updates and alerts.

## **6. Dashboard Requirements for Sales Team**

### **6.1 Sales Performance Metrics:**

- **Revenue Breakdown:** Provide real-time insights into revenue generated from each broadcasting platform (TV, digital, OTT, radio, etc.).
- **Sales by Category and Region:** Visualize sales performance by category, and geographic region, allowing sales teams to monitor regional targets.
- **Salesperson Performance:** Dashboard views displaying individual and team sales performance, tracking KPIs such as:
  - Total revenue generated per salesperson.
  - Number of deals closed.
  - Deal size and average revenue per sale.
  - Pipeline size
  - Proposals in the market
  - Sales conversion rates.
- **Quota Attainment:** Track progress toward individual and team sales targets or quotas and highlight gaps or over-achievement.
- **Pipeline Analysis:** Monitor the sales pipeline for new opportunities, potential bottlenecks, and conversion likelihood, using AI predictions.
- **Exception Analysis:** Negative - Lost, missing or declined accounts. Positive – new accounts, key growth and clients won back
- **Performance against market and competitors:** overall market, performance against competitors per overall market and per Agency

### **6.2 Platform-Specific Reporting:**

- **Broadcast vs. Digital Sales:** Separate views for traditional broadcast sales (TV, radio) and digital platforms (OTT, web ads, social media).
- **Platform Performance:** Analyze which broadcasting platforms are driving the most ad revenue, helping the sales team focus efforts on high-performing platforms.
- **Ad Performance Data:** Measure the effectiveness of ad campaigns across different platforms and correlate them with revenue performance. Link to post-campaign analysis and reporting

### **6.3 Sales Funnel Analysis:**

- **Lead Tracking:** Track leads through different stages of the sales funnel (lead generation, qualification, negotiation, close).
- **Sales Cycle Duration:** Monitor the average time taken to close a deal across various customer segments or platforms.

- **Deal Win/Loss Ratios:** Understand reasons for successful or unsuccessful deals by segmenting by platform, region, or customer type.

#### **6.4 Customer Segmentation Analytics**

- **Customer Segmentation:**
  - **Segment Breakdown:** Classify customers into segments based on predefined criteria such as demographics, industry, revenue, geographic location, or purchasing history.
  - **Sales per Segment:** Visualize sales revenue and opportunities by customer segment, providing a clear view of which segments are performing well and which need more attention.
  - **Audience daily brand consumption across platforms (CLV):** Use AI to predict and display audience consumption of SABC brands for different segments, enabling more strategic targeting of sales pitches and cross-selling opportunities.

### **7 Market Comparison Features**

- **Competitor Analysis:**
  - **Market Share Insights:** Provide comparative data showing the broadcaster's market share versus competitors in different regions, Agency spend or customer segments.
  - **Ad Rate Comparisons:** Display competitor ad rates by platform and region, helping the sales team benchmark pricing strategies.
  - **Industry Trends:** Use external data sources to incorporate market trends and competitor performance into the dashboard, giving the sales team a competitive edge.
- **Benchmarking:**
  - **Sales Target Benchmarking:** Compare sales team performance against industry benchmarks, identifying areas where the sales team is under or overperforming.
  - **Market Growth Rates:** AI-driven insights on market growth rates and sales potential in different regions or segments, enabling more informed decision-making.
- **Advertising Market Data:**
  - **Ad Spend Trends:** Track and visualize trends in advertising spend across different media platforms, industries, and regions.
  - **Revenue vs. Market Potential:** AI models to identify the broadcaster's revenue performance against the total available market, highlighting missed opportunities.

#### **Custom Alerts and Notifications – CRM integration**

- **Sales Alerts:**
  - Customizable alerts for key sales metrics such as when a deal is won or lost, a salesperson reaches a sales target, or when revenue from a platform is significantly lower or higher than expected.
  - AI-driven anomaly detection for sales performance, highlighting unusual trends in revenue or deal flow for immediate action.

## **Forecasting and Predictive Analytics**

- **Revenue Forecasting:**
  - AI-based revenue forecasting for the upcoming quarters, based on historical data, market trends, and sales team CRM activity.
  - Sales target achievement probability based on pipeline analysis and AI insights.
- **Deal Forecasting:**
  - Predict which sales opportunities are likely to close successfully, enabling the sales team to prioritise leads.

## **Airtime Management:**

- **Airtime utilisations:** sell-out ratios and spot count (per programme, channel, timeslot, genre, platform, business model)
- **Revenue bookings:** billings analysis (per programme, channel, timeslot, genre, platform, business model)
- Turnaround times for booking execution.
- Booking error rate and error classification.
- Tracking of issue resolution – query logging, tracking and closing.
- Trend analysis of airtime utilization.

## **8. Common Requirements for Both Dashboards**

### **Actionable Insights:**

- AI-driven recommendations for decision-making.
- Predictive analytics for future trends.
- Customizable alerts and notifications.

### **Data Integration:**

- Seamless integration with various data sources (internal and external).
- Data visualisation for easy interpretation.
- Secure data access and user management.

### **User Experience:**

- Intuitive and user-friendly interface.
- Customizable views and reports.
- Mobile accessibility for on-the-go insights.

## **6.RFQ Validity period**

This bid will remain valid **90 (ninety) days** from the date of bid closing.

## **9 Duration of the Contract**

Twelve months



## 10 Location

SABC Auckland Park,

## 11 SECOND PHASE: FUNCTIONALITY / TECHNICAL EVALUATION CRITERIA

- The tender submission will be technically evaluated out of 90
- A minimum threshold of **65 out of a maximum of 90** has been set.
- Bidders achieving less than the set threshold will be declared non-responsive and therefore will not continue forward for evaluation of Price.

Evaluation Area	Evaluation Criteria	Min Points	Max points
Relevant qualifications of team members	Relevant resource experience and expertise in Power BI <ul style="list-style-type: none"> <li>• Bidder to submit minimum of two CVs of the resources with relevant certificates on Microsoft Power BI <b>(10 Points)</b></li> <li>• Less than two qualifying CVs <b>(0 points)</b></li> </ul>	<b>10</b>	<b>10</b>
Relevant experience of team members	Both CVs must meet the following requirements <ul style="list-style-type: none"> <li>• Minimum of three previous implementations, clearly demonstrating integration of diverse data sources <b>(15 points)</b></li> <li>• Minimum of two previous implementations, clearly demonstrating of integration of diverse data sources <b>(10 points)</b></li> <li>• Less than two previous implementations <b>(0 Points)</b></li> </ul>	<b>10</b>	<b>15</b>
Relevant Industry experience	Team members or company must demonstrate experience in the following industries: <ul style="list-style-type: none"> <li>• Media, Broadcasting, Telecommunications, FMCG, Hospitality or Financial Services <b>(5 points)</b></li> </ul>	<b>5</b>	<b>5</b>
Company's experience on Power BI development and data integration.	Bidders to submit recent dated and signed (not older than 3 years) references from one of these sectors will be accepted by <b>Media, Broadcasting, FMCG, Telecommunications, Hospitality or Financial Services</b> . Each letter/s must meet all of the following requirements in order to be accepted for evaluation.	<b>10</b>	<b>15</b>

Evaluation Area	Evaluation Criteria	Min Points	Max points
	<p><b>The reference letter must:</b></p> <ul style="list-style-type: none"> <li>include the company name as well as the relevant contact person (with designation), contact number and email address.</li> <li>Letters should include the period of the project implementation.</li> <li>Not be older than three (3) year by the closing date of this bid.</li> <li>Be on client's company's letterhead</li> <li>Be signed by an authorised client representative.</li> </ul> <p><b>Letters that do not meet all the above requirements will be automatically disqualified.</b></p> <ul style="list-style-type: none"> <li>Submission of three (3) or more references letters: <b>15 points</b></li> <li>Submission of two references letters: <b>10 points</b></li> <li>Less than two references letters: <b>0 points</b></li> </ul>		
Project timelines	<p>Bidder to submit a detailed project plan clearly indicating proposed timelines on the implementation</p> <ul style="list-style-type: none"> <li>Implementation within three months <b>(10 points)</b></li> <li>Between three to four months <b>(5 points)</b></li> <li>More than four months <b>(0 points)</b></li> </ul>	5	10
Post go live support	<p>Bidder to submit a detailed project plan clearly indicating proposed post go live support model which includes the following</p> <ul style="list-style-type: none"> <li>Availability of suitable qualified resources <b>(4 points)</b></li> <li>Turnaround times <b>(4 points)</b></li> <li>Proactive monitoring of dashboards and data pathways <b>(4 points)</b></li> <li>Continuous improvement and feedback loop <b>(4 points)</b></li> <li>System availability at 95 % - 100 % <b>(4 points)</b></li> </ul>	20	20

Evaluation Area	Evaluation Criteria	Min Points	Max points
Training	<ul style="list-style-type: none"> <li>Proposal to includes knowledge transfer to SABC finance staff, <b>(10 points)</b></li> <li>Comprehensive user manuals and troubleshooting guidelines <b>(5 Points)</b></li> </ul>	5	15
<b>Total</b>		<b>65</b>	<b>90</b>

## 12 PRICE AND SPECIFIC GOALS

12.1 The 80/20 preference point system will apply to evaluate responses

12.2 The award of the tender / RFQ to will be based on functionality evaluation.

12.3 The Price and BEE (Specific goals) will be applicable to award the highest scoring bidder

## 13 PRICE AND (SPECIFIC GOALS) APPLICATION DURING CONTRACT IMPLEMENTATION

### 13.1 PRICE

The **80/20** preference point system

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

$$P_s = 80 \left( 1 - \frac{P_t - P_{min}}{P_{min}} \right)$$

Where:

$P_s$  = Points scored for comparative price of bid under Consideration

$P_t$  = Comparative price of bid under consideration

$P_{min}$  = Comparative price of lowest acceptable bid

### 13.2 BEE (SPECIFIC GOALS)

<b><u>SPECIFIC GOALS</u></b>	<b><u>80/20</u></b>
EME/SME 51% owned by Black people	<b>10</b>
51% owned by Black people;	<b>5</b>
51% owned by Black people who are women	<b>3</b>
Black Youth	<b>2</b>

- **NB: All tenders will be issued to the market with all specific goals, and these will be scored in accordance with the evidence as submitted by the bidder. The bidder who does not meet the specific goals will not be disqualified but score zero.**

### 13.3 ADJUDICATION USING A POINT SYSTEM

- The bidder obtaining the highest number of total points will be awarded the contract.
- Preference points shall be calculated after process has been brought to a comparative basis taking into account all factors of non-firm prices.
- Should two or more bids be equal in all respects, the award shall be decided by the drawing of lots.

### 13.4 Objective Criteria

- The SABC reserves the right not to award this tender to any bidder based on the proven poor record of accomplishment of the bidder in previous projects within the SABC.
- The SABC will not award contract/s to the bidders who are blacklisted or have committed other acts of fraud and misrepresentation of facts e.g., tax compliance, company financials, etc. will be eliminated from the bid process.
- The SABC reserve the right not to award this tender to any bidder who fails the financial stability assessment.
- No SABC former employees shall be awarded contracts with the SABC within 24 months after termination of employment with the SABC.
- Should employees resign or retire from the employment of the SABC and become directors of other businesses tendering with the SABC, such tender shall not be considered until the cooling off period of 24 (twenty-four) months has expired.
- Should the employee be dismissed from the SABC employment, such employee shall be prohibited from conducting business with SABC for a period of 5 (five) years from the date of dismissal.
- Should the employee be found guilty in a court of law due to criminal conduct/act, such employee will not be considered to do/conduct business with SABC, until the criminal record has been legally expunged.
- The SABC shall not procure any goods, services, works or Content from any Board member or Board member owned business, to ensure that suppliers competing for the SABC's business have confidence in the integrity of SABC's selection process.
- Should the SABC's Board members no longer serve on the SABC Board but become directors of other companies, the SABC shall not conduct business with those companies until the cooling off period of 24 (twenty-four) months has expired.
- Should the Board member be found guilty in a court of law due to criminal conduct/act, such Board member will not be considered to do/conduct business with SABC, until the criminal record has been legally expunged.
- The SABC shall not procure any goods, services, works or Content from any independent contractor or independent contractor owned business, to ensure that suppliers competing for the SABC's business have confidence in the integrity of SABC's selection process.
- Should the Independent Contractor no longer be contracted to the SABC but become directors of other companies, the SABC shall not conduct business with those companies until the cooling-off period of 24 (twenty-four) months has expired.

- Should the Independent Contract be found guilty in a court of law due to criminal conduct/act, such employee will not be considered to do/conduct business with SABC, until the criminal record has been legally expunged.

## 14 COMMUNICATION

Respondents are warned that a response will be disqualified should any attempt be made by a tenderer either directly or indirectly to canvass any officer(s) or employees of SABC in respect of a tender, between the closing date and the date of the award of the business.

All enquiries relating to this RFQ should be emailed three days before the closing date.

## 15 CONDITIONS TO BE OBSERVED WHEN TENDERING

- The Corporation does not bind itself to accept the lowest or any tender, nor shall it be responsible for or pay any expenses or losses which may be incurred by the Tenderer in the preparation and delivery of his tender. The Corporation reserves the right to accept a separate tender or separate tenders for any one or more of the sections of a specification. The corporation also reserves the right to withdraw the tender at any stage.
- No tender shall be deemed to have been accepted unless or until a formal contract / letter of award is signed by both parties.
- **The Corporation reserves the right to:**
  - Make a selection solely on the information received in the submissions
  - Enter into negotiations with any one or more of preferred bidder(s) based on the criteria specified in the evaluation of this tender.
  - Contact any bidder during the evaluation process, in order to clarify any information, without informing any other bidders. During the evaluation process, no change in the content of the RFQ shall be sought, offered or permitted.
  - Cancel this RFQ or any part thereof at any time.
- Should a bidder(s) be selected for further negotiations, they will be chosen on the basis of the greatest benefit to the Corporation and not necessarily on the basis of the lowest costs, aligned to the BEE & Price.

## 16 Cost of Bidding

The Tenderer shall bear all costs and expenses associated with preparation and submission of its tender or RFQ, and the Corporation shall under any circumstances be responsible or liable for any

such costs, regardless of, without limitation, the outcome of the bidding, evaluation, and selection process.

**17 PAYMENT TERMS**

SABC will effect payment sixty (60) days after the service provider has rendered the service and submitted an invoice / statement.

**END OF RFQ DOCUMENT**

**Annexed to this document for completion and return with the document:**

- Annexure A - Declaration of Interest
- Annexure B - **SBD 6.1 Form**
- Annexure C - Consortiums, Joint Ventures and Sub-Contracting Regulations
- Annexure D - Previous completed projects/Current Projects
- Annexure E - SBD 4 Form
- Annexure F - Pricing Schedule

## ANNEXURE A

### DECLARATION OF INTEREST

1. Any legal or natural person, excluding any permanent employee of SABC, may make an offer or offers in terms of this tender invitation. In view of possible allegations of favoritism, should the resulting tender, or part thereof be awarded to-
  - (a) any person employed by the SABC in the capacity of Tenderer, consultant or service provider; or
  - (b) any person who acts on behalf of SABC; or
  - (c) any person having kinship, including a blood relationship, with a person employed by, or who acts on behalf of SABC; or
  - (d) any legal person which is in any way connected to any person contemplated in paragraph (a), (b) or (c),

it is required that:

The Tenderer or his/her authorised representative shall declare his/her position *vis-à-vis* SABC and/or take an oath declaring his/her interest, where it is known that any such relationship exists between the Tenderer and a person employed by SABC in any capacity.

Does such a relationship exist? [YES/NO]

If YES, state particulars of all such relationships (if necessary, please add additional pages containing the required information):

	[1]	[2]
NAME	:	.....
POSITION	:	.....
OFFICE WHERE EMPLOYED	:	.....
TELEPHONE NUMBER	:	.....
RELATIONSHIP	:	.....

2. Failure on the part of a Tenderer to fill in and/or sign this certificate may be interpreted to mean that an association as stipulated in paragraph 1, *supra*, exists.
3. In the event of a contract being awarded to a Tenderer with an association as stipulated in paragraph 1, *supra*, and it subsequently becomes known that false information was provided in response to the above question, SABC may, in addition to any other remedy it may have:
  - recover from the Tenderer all costs, losses or damages incurred or sustained by SABC as a result of the award of the contract; and/or
  - cancel the contract and claim any damages, which SABC may suffer by having to make less favourable arrangements after such cancellation.

\_\_\_\_\_  
SIGNATURE OF DECLARANT

\_\_\_\_\_  
TENDER NUMBER

\_\_\_\_\_  
DATE

\_\_\_\_\_  
POSITION OF DECLARANT

\_\_\_\_\_  
NAME OF COMPANY OR TENDERER



**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**

a) The applicable preference point system for this tender is the **80/20** preference point system.

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price; and
- (b) Specific Goals.

**1.4 To be completed by the organ of state:**

The maximum points for this tender are allocated as follows:

<b>SPECIFIC GOALS</b>	<b>80/20</b>
<b>EME/SME 51% owned by Black people</b>	<b>10</b>
<b>51% owned by Black people;</b>	<b>5</b>
<b>51% owned by Black people who are women</b>	<b>3</b>

<b>Black Youth</b>	<b>2</b>
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- 1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.
- 1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

## 2. DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation.
- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

## 3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

### 3.1. POINTS AWARDED FOR PRICE

#### 3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

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

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

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

$P_{min}$  = 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**

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

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 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)	Number of points claimed. (80/20 system)

	(To be completed by the organ of state)	(To be completed by the tenderer)
SMMEs (inclusive or QSEs and EMEs) 51% owned by Black people	10	
51% owned by Black people;	5	
51% owned by Black people who are women	3	
Black Youth	2	

*NB: All tenders will be issued to the market with all specific goals, and these will be scored in accordance with the evidence as submitted by the bidder. The bidder who does not meet the specific goals will not be disqualified but score zero*

#### Source Documents to be submitted with the tender or RFQ

Specific Goals	Acceptable Evidence
B-BBEE	Valid BEE Certificate / Sworn Affidavit (in case of JV, a consolidated scorecard will be accepted)
Black Women Owned	Certified ID Documents of the Owners/shareholder
Black Youth owned	Certified ID Documents of the Owners
EME or QSE 51% Black Owned	Annual Financial/ Management Accounts/ B-BBEE Certificate / Affidavit/ Certified ID Documents of the Owners/shareholder
51% Black Owned	CIPC Documents / B-BBEE Certificate/Affidavit/ Certified ID Documents of the Owners/shareholder
South African Enterprises	CIPC Documents

#### DECLARATION WITH REGARD TO COMPANY/FIRM

- 4.3. Name of company/firm.....
- 4.4. Company registration number: .....
- 4.5. TYPE OF COMPANY/ FIRM
- ☐ Partnership/Joint Venture / Consortium
  - ☐ One-person business/sole propriety
  - ☐ Close corporation
  - ☐ Public Company
  - ☐ Personal Liability Company

- ☐ (Pty) Limited
- ☐ Non-Profit Company
- ☐ State Owned Company

[TICK APPLICABLE BOX]

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

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

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

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

**DATE:** .....

**ADDRESS:** .....



## ANNEXURE C

### CONSORTIUMS, JOINT VENTURES AND SUB-CONTRACTING REGULATIONS

#### 1. CONSORTIUMS AND JOINT VENTURES

- 1.1 A trust, consortium or joint venture will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their B-BBEE status level certificate.
- 1.2 A trust, consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate tender.

#### 2 SUB-CONTRACTING

- 2.1 A person awarded a contract may only enter into a subcontracting arrangement with the approval of the organ of state.
- 2.2 A person awarded a contract in relation to a designated sector, may not subcontract in such a manner that the local production and content of the overall value of the contract is reduced to below the stipulated minimum threshold.
- 2.3 A person awarded a contract may not subcontract more than 30% of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level of contributor than the person concerned, unless the contract is subcontracted to an EME that has the capability and ability to execute the subcontract.

#### 3 DECLARATION OF SUB-CONTRACTING

- 3.1 Will any portion of the contract be sub-contracted? YES / NO
- 3.2 If yes, indicate:
- 3.2.1 The percentage of the contract will be sub-contracted .....%
- 3.2.2 The name of the sub-contractor .....
- 3.2.3 The B-BBEE status level of the sub-contractor.....
- 3.2.4 whether the sub-contractor is an EME YES / NO

\_\_\_\_\_  
SIGNATURE OF DECLARANT

\_\_\_\_\_  
TENDER NUMBER

\_\_\_\_\_  
DATE

\_\_\_\_\_  
POSITION OF DECLARANT

\_\_\_\_\_  
NAME OF COMPANY OR TENDERER

RFQ/FIN//2025-1

**ANNEXURE “D”****Previous completed projects (preferably provide a detailed company profile, detailed the below mentioned information)**

<b>Project Descriptions</b>	<b>Client</b>	<b>Contact no</b>	<b>Contact person</b>	<b>Email address</b>	<b>Period of projects</b>	<b>Value of projects</b>	<b>Project Commence date</b>	<b>Completed date</b>

**Current projects (preferably provide a detailed company profile, detailed the below mentioned information)**

<b>Project Descriptions</b>	<b>Client</b>	<b>Contact no</b>	<b>Contact person</b>	<b>Email address</b>	<b>Period of projects</b>	<b>Value of projects</b>	<b>Project Commence date</b>	<b>Completion date</b>



## 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.

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**

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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.

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

<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.

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

PRICING SCHEDULE

		12 Months	
	Description	Quantity/hours	Total cost
1.	Implementation		
2.	Project Management		
3	Professional Service		
4	Support and Maintenance		
5	Training		
	<b>Other (Specify)</b>		
	<b>Total Excluding Vat</b>		
	<b>TOTAL Including Vat</b>		