



3233 Nokukhanya Luthuli Street  
Groutville KwaZulu - Natal  
South Africa  
PO Box 1869,  
KWADUKUZA 4450  
tel. (032) 559 6822  
fax. (032) 559 6806  
email: [luthulimuseum@luthulimuseum.org.za](mailto:luthulimuseum@luthulimuseum.org.za)  
website: [www.luthulimuseum.org.za](http://www.luthulimuseum.org.za)

<b>RFQ NUMBER</b>	RFQ LM 2025/0092
<b>RFQ DESCRIPTION</b>	THE APPOINTMENT OF AN EXPERIENCED AND QUALIFIED SERVICE PROVIDER FOR THE PROVISION OF SHORT-TERM INSURANCE SERVICES FOR A PERIOD OF THIRTY-SIX (36) MONTHS FOR LUTHULI MUSEUM
<b>RFQ ISSUE DATE</b>	05 DECEMBER 2025
<b>COMPULSORY BRIEFING SESSION</b>	NONE
<b>CLOSING DATE &amp; TIME</b>	15 DECEMBER 2025 AT 13H00
<b>LOCATION FOR SUBMISSIONS</b>	<a href="mailto:scmofficer@luthulimuseum.org.za">scmofficer@luthulimuseum.org.za</a>  <b>PLEASE NOTE THAT THE LUTHULI MUSEUM WILL NOT BE ACCEPTING HAND DELIVERED PROPOSALS</b>
<b>NUMBER OF DOCUMENTS</b>	1 SOFT COPY

For enquiries, please contact [scmofficer@luthulimuseum.org.za](mailto:scmofficer@luthulimuseum.org.za) before closing date of the RFQ.

The Luthuli Museum request 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 quotation submitted.**

SUPPLIER NAME: .....

NATIONAL TREASURY (CSD) SUPPLIER NUMBER: .....

POSTAL ADDRESS: .....

CELL/ TELEPHONE NO: .....

EMAIL ADDRESS: .....

CONTACT PERSON: .....

SIGNATURE OF BIDDER: .....

#### SUPPLIER REGISTRATION ON CSD

Prospective suppliers must register on the National Treasury Central database in terms of National Treasury circular no 4A of 2016/17. The bidder must register prior to submitting a proposal/bid.



3233 Nokukhanya Luthuli Street  
 Groutville KwaZulu - Natal  
 South Africa  
 PO Box 1869,  
 KWADUKUZA 4450  
 tel. (032) 559 6822  
 fax. (032) 559 6806  
 email: luthulimuseum@luthulimuseum.org.za  
 website: www.luthulimuseum.org.za

## RETURNABLE DOCUMENTS CHECKLIST

Quotation invitation document must be completed, signed and submitted by the authorised Company representative. All forms must be properly completed; list below serve as a checklist of your RFQ submission.

(Tick in the relevant block below)

DESCRIPTION	YES	NO	COMMENTS
Central Supplier Database Registration Report			
Pricing Schedule / Quotation			
Valid SARS Tax Pin			
BBBEE Affidavit/ Certificate			
CIPC Registration Documents			
Director (s) Certified ID Copy			
Company Profile			
List of Clients that the company has rendered same services			
At least 3 Traceable Reference Letters on Company Letterhead			
CVs and Professional Qualifications of Director/ Key Personnel			
Financial Services Board Accreditation			
Public Liability Insurance			
COIDA Certificate/ Letter of Good Standing			
SBD 4 – Bidder Declaration			
SBD 6.1 – Preferential Procurement Claim Form			

**Note: This RFQ must be completed and signed by the authorised company representative.**



3233 Nokukhanya Luthuli Street  
Groutville KwaZulu - Natal  
South Africa  
PO Box 1869,  
KWADUKUZA 4450  
tel. (032) 559 6822  
fax. (032) 559 6806  
email: luthulimuseum@luthulimuseum.org.za  
website: www.luthulimuseum.org.za

## **LUTHULI MUSEUM RFQ CONDITIONS**

### **1. QUOTATION CONDITIONS**

- 1.1 **Luthuli Museum** does not bind itself to accept the lowest or any RFQ, nor shall it be responsible for or pay any expenses or losses which may be incurred by the bidder in the preparation and delivery of the RFQ.
- 1.2 No RFQ shall be deemed to have been accepted unless and until a formal contract/letter of intent is prepared and executed.
- 1.3 **Luthuli Museum** reserves the right to:
  - I. Not evaluate and award RFQ that do not comply strictly with the requirements of this RFQ.
  - II. Select solely on the information received in the RFQs and Enter into negotiations with any one or more of the preferred bidders(s) based on the criteria specified in the evaluation of this RFQ.
  - III. Contact any bidder during the evaluation process, to clarify any information, without informing any other bidders, and no change in the content of the RFQ shall be sought, offered, or permitted.
  - IV. Award a contract to one or more bidder(s).
  - V. Withdraw the RFQ at any stage
  - VI. Accept a separate RFQ or any RFQ in part or full at its own discretion.
  - VII. Cancel this RFQ or any part thereof at any stage as prescribed in the PPPFA regulation.
  - VIII. Select the bidder(s) for further negotiations based on the greatest benefit to **Luthuli Museum** and not necessarily based on the lowest costs

### **2. GENERAL AND SPECIAL CONDITIONS OF CONTRACT**

- 2.1 The **General Conditions of Contract (GCC)** forming part of this set of bid documents will be applicable to this bid in addition to the conditions of bid.
- 2.2 **Acceptance or Rejection of a Bid**
  - a) The Luthuli Museum reserves the right to withdraw any invitation to bid and/or to re-advertise or to reject any bidder or to accept a part of it. The Luthuli Museum does not bind itself to accepting the lowest bidder or the bidder scoring the highest points.
- 2.3 **Validity Period**
  - a) Bids shall remain valid for ninety (90) days after the bid closure date
- 2.4 **Completion of Bid Documents**
  - a) The original bid document must be completed fully in black ink and signed by the authorised signatory to validate the bid.
  - b) Bid documents may not be retyped. Retyped documents will result in the disqualification of the bid.
  - c) The complete original bid document must be returned. Missing pages will result in the disqualification of the bid.
  - d) No unauthorised alteration of this set of bid documents will be allowed. Any unauthorised alteration will disqualify the bid automatically. Any ambiguity has to be cleared with contact person for the bid before the bid closure.
- 2.5 **Negotiations**
  - a) Should the bid prices be higher than the available funds of the client, the client reserves the right to negotiate with the successful bidder to limit the work in accordance with the bid specifications in order not to exceed the available budget.



3233 Nokukhanya Luthuli Street  
Groutville KwaZulu - Natal  
South Africa  
PO Box 1869,  
KWADUKUZA 4450  
tel. (032) 559 6822  
fax. (032) 559 6806  
email: [luthulimuseum@luthulimuseum.org.za](mailto:luthulimuseum@luthulimuseum.org.za)  
website: [www.luthulimuseum.org.za](http://www.luthulimuseum.org.za)

### 3. COST OF BIDDING

The bidder shall bear all costs and expenses associated with the preparation and submission of its RFQ, and the **Luthuli Museum** shall under no circumstances be responsible or liable for any such costs, regardless of, without limitation, the conduct or outcome of the bidding, evaluation, and selection processes.



3233 Nokukhanya Luthuli Street  
Groutville KwaZulu - Natal  
South Africa  
PO Box 1869,  
KWADUKUZA 4450  
tel. (032) 559 6822  
fax. (032) 559 6806  
email: luthulimuseum@luthulimuseum.org.za  
website: www.luthulimuseum.org.za

## TERMS OF REFERENCE

### **THE APPOINTMENT OF AN EXPERIENCED AND QUALIFIED SERVICE PROVIDER FOR THE PROVISION OF SHORT-TERM INSURANCE SERVICES FOR A PERIOD OF THIRTY-SIX (36) MONTHS FOR LUTHULI MUSEUM**

#### **1. INTRODUCTION**

- 1.1 Luthuli Museums is a schedule 3A public entity and non-profit organisation, subsidised by the National Department of Sports Arts & Culture. Luthuli Museum was established in terms of the Cultural Institutions Act, 1998 (Act No. 119 of 1998) and must comply with the Public Finance Management Act, 1999 (Act 1 of 1999) (PFMA) and its concomitant Regulations. The Luthuli Museum supports on-site and travelling exhibitions that honour, explore and inform about the legacy of Chief Albert Luthuli and the Liberation Movement.

#### **2. SCOPE OF WORK OF THE REQUIRED COVERAGE**

- (a) The required insurance coverage by the Luthuli is as follows:

NO	TYPE OF COVERAGE	CHECKLIST		REMARKS
		YES	NO	
1.	BUILDINGS			
2.	FIRE & ALLIED PERILS			
3.	BUSSINESS INTERRUPTION			
4.	FIDELITY AND MONEY			
5.	MOTOR VEHICLES			
6.	ACCIDENTAL DAMAGE			
7.	GOODS IN TRANSIT			
8.	PUBLIC LIABILITY			
9.	DIRECTORS AND OFFICERS LIABILITY			
10.	GROUP PERSONAL ACCIDENT			
11.	EMPLOYEE STATED BENEFITS			
12.	MECHANICAL EQUIPMENT			
13.	ELECTRONIC EQUIPMENT			
14.	SASRIA			



3233 Nokukhanya Luthuli Street  
Groutville KwaZulu - Natal  
South Africa  
PO Box 1869,  
KWADUKUZA 4450  
tel. (032) 559 6822  
fax. (032) 559 6806  
email: luthulimuseum@luthulimuseum.org.za  
website: www.luthulimuseum.org.za

(b) The following information will be provided on request to assist with the insurance coverage required:

NO	INSURANCE ITEM	DESCRIPTION
1.	ASSETS REGISTER	Includes list of all movable and immovable assets, with values
2.	MUSEUM HERITAGE COLLECTIONS	Valuation of the museum heritage collections and exhibitions
3.	BUILDINGS	Description and condition of buildings

2.2 Bids that are Insurance Brokers registered with the Financial Services Board (FSB) are invited by the Luthuli Museum with the minimum specifications as follows:

#### 2.2.1 BID

- a) This bid is for the Provision of Short-Term Insurance Services to Luthuli Museum.

#### 2.2.2 PERIOD

- a) The period of the contract will be for thirty-six months (three years).

#### 2.2.3 RATE PERCENTAGE AND PREMIUM

- a) The rate percentages per policy class as quoted by the bidder on the Pricing Schedule MUST remain fixed for the first 12 months of the contract.
- a) Excess per policy class must be clearly stated on the detailed pricing schedule or attached as an addendum to this bid document.
- b) The rate percentage and insurance premium quoted must be annually and not monthly so as to obtain the best possible rates for the Luthuli Museum.
- c) Please note that Luthuli Museum requires that fixed assets be insured at replacement value.

#### 2.4 PRICING SCHEDULE

- a) All insurance coverage prices on the Pricing Schedule must be VAT inclusive.

#### 2.5 BROKER FEE AND COMMISSION

- a) It must be clearly stated on the pricing schedule whether broker fees and commission is included or excluded in the premium.

#### 2.6 PRESENTATIONS

- a) Please note that selected bidders may be invited to present bid proposals to the Luthuli Museum before final awarding of the bid.



3233 Nokukhanya Luthuli Street  
Groutville KwaZulu - Natal  
South Africa  
PO Box 1869,  
KWADUKUZA 4450  
tel. (032) 559 6822  
fax. (032) 559 6806  
email: luthulimuseum@luthulimuseum.org.za  
website: www.luthulimuseum.org.za

## 2.7 REFERENCES

- a) A detailed list of clients with contact details must be supplied as reference.
- b) Please note that insurance brokers with a minimum of 5 – 10 years' experience in Public Entities or insurance of museum assets will have preference.

## 2.8 INSURANCE BROKERS

- a) The Luthuli Museum will only deal with reputable brokers directly (client – broker – insurance company) and will not consider any bid that involves a sub-broker or agency.
- b) A full company profile containing detailed credentials must be submitted together with the bid. Joint Venture partners must all be registered suppliers and must also include a copy of the Joint Venture Agreement.
- c) The insurance broker must submit a copy of their Financial Services Board certificate to the bid document.

## 2.9 CLAIMS ADMINISTRATION

Administration of claims reported to the insurance Broker.

- a) The Insurance Broker will acknowledge receipt of claims forms and confirm all claims in writing to the client within 7 (seven) days after receipt of the notification of the incident.
- b) If the claim is approved by the insurer an Agreement of Loss will be generated and forwarded to the insurance section of the client within 7 (seven) days of receipt of all the applicable documentation.
- c) The Insurance Broker will assist the Insurance Section of the client with the administration of claims in order to finalize all outstanding claims i.e. obtaining of reports, invoices, quotations etc.

## 2.10 SCHEDULING AND COORDINATING OF CLAIMS

- a) The Insurance Broker will schedule and coordinate a monthly claims meeting when required (ad-hoc) with the Insurance Section of the client.
- b) The purpose of the meeting will be to discuss all claims as per applicable Insurance Policies reported by the Insurance Section to the Insurance Broker. Monitoring of progress of all insurance claims reported to and authorized by the Insurance Broker

## 2.11 CLAIMS ADMINISTRATION SYSTEM TO ADMINISTER OCCUPATIONAL INJURIES AND DISEASE CLAIMS

need to understand details further

It is expected of the Broker to have capacity to provide the following services at an appropriate time to be determined by the Luthuli Museum on a fee to be agreed with the Luthuli Museum.

- a) Administration of all claims arising from occupational activities of the employees of the Luthuli Museum pursuant the Compensation for Occupational Injuries and Disease Act no 130 of 1993 and the Occupational Health and Safety Act



3233 Nokukhanya Luthuli Street  
Groutville KwaZulu - Natal  
South Africa  
PO Box 1869,  
KWADUKUZA 4450  
tel. (032) 559 6822  
fax. (032) 559 6806  
email: [luthulimuseum@luthulimuseum.org.za](mailto:luthulimuseum@luthulimuseum.org.za)  
website: [www.luthulimuseum.org.za](http://www.luthulimuseum.org.za)

- b) Formulation and Implementation of Risk Management Strategy in line with the provision of the Public Finance Management Act.
- c) Management of Occupational Injuries and Diseases Act as well as Occupational Health and Safety Act risk related to the implementation of construction contracts by third parties on behalf of Luthuli Museum.

## 2.12 GENERAL CONDITIONS OF CONTRACT

- a) The National Treasury: General Conditions of Contract forms part of this bid and will be applicable on signing of the final contract by the preferred bidder.

## 2.13 REPUTABLE INSURANCE COMPANIES

- a) Only underwriting by reputable insurance companies with experience will be accepted. Luthuli Museum shall in its absolute discretion be entitled to reject underwriting by any specific insurance company and shall not have to furnish reasons, therefore. The insurance broker must include documentary proof from the underwriting insurance company to support the bid document.

## PROVISION FOR SHORT TERM INSURANCE SERVICES.

Specifications.

- a) The contract for provision of insurance services will be for a period of thirty-six months (3 years).
- b) The Luthuli Museum reserves the right to review the contract annually or at any stage in the event of material breach of service level agreement.
- c) The premium payment will be made on or before inception of cover upon receipts of all tax invoices by Luthuli Museum.
- d) In case of an increase or decrease in assets including insurable interests, the premium will be adjusted accordingly.
- e) Premiums will be paid annually.

## ACCEPTANCE OF THE BID CONDITIONS

.....

Signature of the Bidder





3233 Nokukhanya Luthuli Street  
Groutville KwaZulu - Natal  
South Africa  
PO Box 1869,  
KWADUKUZA 4450  
tel. (032) 559 6822  
fax. (032) 559 6806  
email: luthulimuseum@luthulimuseum.org.za  
website: www.luthulimuseum.org.za

## PRICING SCHEDULE

Name of Bidder: ..... RFQ Number: .....

Closing Date: .....

RFQ shall remain valid for acceptance for a period of **60 days** counted from closing date.

The Specialists price must include all expense costs (e.g. professional fees, labour, etc.) that may be incurred in the execution of the work described in the Terms of Reference, and shall cover the cost of all general risks, liabilities and obligations set forth or implied in the contract as well as overhead charges and profit (in the event that the submission is successful). The bided price will be fixed, final and binding.

The appointed specialist will be required to carry out the scope of work as per the approved scope of work and the services will be expected to be rendered as of the 01<sup>st</sup> of the month after receipt of the appointment letter.

**BIDDERS MUST PROVIDE PRICING SCHEDULE / QUOTATION ON A SEPARATE COMPANY LETTERHEADED PRICE SCHEDULE/ QUOTATION.**

Complete below:

1. Goods/Services Delivery Address: **Luthuli Museum**  
**3233 Nokukhanya Luthuli Street,**  
**Groutville, KwaDukuza, 4450**
2. Indicate Delivery period after order receipt .....
3. Is delivery period fixed? **Yes/No**
4. Is the price(s) fixed? **Yes/No**
5. Is the quote strictly to specification? **Yes/No**

I/We, the undersigned, agree that this bidding price shall remain binding on me/us and open for acceptance for the period stipulated above.

Authorised Company Representative: .....

Capacity under which this quote is signed: .....

Signature: .....

Date: .....



3233 Nokukhanya Luthuli Street  
Groutville KwaZulu - Natal  
South Africa  
PO Box 1869,  
KWADUKUZA 4450  
tel. (032) 559 6822  
fax. (032) 559 6806  
email: luthulimuseum@luthulimuseum.org.za  
website: www.luthulimuseum.org.za

## EVALUATION CRITERIA

RFQs received will be evaluated on mandatory criteria, and Price & specific goals comparison.

### **STAGE:1 MANDATORY CRITERIA**

- a) Valid SARS Tax Pin
- b) BBBEE Affidavit/ Certificate
- c) CIDB Registration – Contractor Grading 1GB or Higher
- d) CIPC Registration Documents
- e) Director (s) Certified ID Copy
- f) Company Profile
- g) List of clients that same service has been rendered
- h) At least 3 Traceable Reference Letters on Company Letterhead
- i) CVs and Professional Qualifications of Director/ Key Personnel
- j) Financial Services Board Accreditation
- k) Public Liability Insurance
- l) COIDA Certificate/ Letter of Good Standing

**Note: Bidders that do not meet the set mandatory criteria will be eliminated from further evaluation process.**

### **STAGE 2: FUNCTIONALITY EVALUATION**

The Functional Criteria that will be used to test the capability of Bidders are as follows: The technical proposal will be evaluated according to the following criteria and scoring system. The technical score will be calculated out of **100 points**, and only those bids that achieve a threshold of **70 points** for the technical proposal will move to the next level of evaluation where a score for **price**.

The evaluation of the functional/technical detail of the proposal will be based on the following criteria:

Functional Factor	Criteria Description	Weight (%)
Company Accreditation	<ul style="list-style-type: none"> <li>Bidders must be members of the Financial Services Board Accreditation</li> </ul>	10
Company Profile	<ul style="list-style-type: none"> <li>Bidder must submit a company profile indicating their core function, age, resources, and capability.</li> </ul>	30
Company Experience	<ul style="list-style-type: none"> <li>Bidders must demonstrate the company's relevant experience by submitting a list of similar projects executed between 2020 and 2025.</li> <li>The list of projects must be relevant to the services required by Luthuli Museum.</li> <li>A minimum of three (3) projects must be submitted.</li> </ul>	30
Reference Letters	<ul style="list-style-type: none"> <li>Bidder must submit reference letters for work completed between 2020 and 2025 from previous clients.</li> <li>The reference letters must be relevant to the services required.</li> <li>A minimum of three (3) reference letters must be submitted.</li> </ul>	30
<b>TOTAL POINTS FOR FUNCTIONALITY</b>		<b>100</b>



3233 Nokukhanya Luthuli Street  
Groutville KwaZulu - Natal  
South Africa  
PO Box 1869,  
KWADUKUZA 4450  
tel. (032) 559 6822  
fax. (032) 559 6806  
email: luthulimuseum@luthulimuseum.org.za  
website: www.luthulimuseum.org.za

## SCORING SHEET

No.	Criteria	Proof required	Points allocation	Weight
1.	Company Accreditation	Bidders must be members of the Financial Services Board	No submission -0 points Proof of Financial Services Board Accreditation - 10 points	10%
2.	Company profile	Bidder must submit a company profile indicating their core function, age, resources, and capability.	No submission - 0 point 1 to 4 years of operation - 5 points 5 to 6 years of operation - 10 points 7 to 9 years of operation - 15 points > 9 years of operation - 30 points	30%
3.	Company Experience	Bidders must submit a list of same relevant services rendered between 2020 and 2025. The list of projects must be relevant to the scope of work by the Luthuli Museum.	No submission - 0 point 1-2 relevant projects submitted - 5 points 3-4 relevant projects submitted - 10 points 5-6 relevant projects submitted - 15 points >7 relevant projects submitted - 30 points	30%
4.	Reference Letters	Bidders must submit reference letters for services rendered between 2020 to 2025 from previous clients. (Reference letters must be written and signed by the clients where the services were rendered.)	No submission - 0 point 1-2 relevant references submitted - 5 points 3-4 relevant references submitted - 10 points 5-6 relevant references submitted - 15 points >7 relevant references submitted - 30 points	30%
<b>TOTAL</b>				<b>100%</b>

### STAGE:3. PRICE AND SPECIFIC GOALS EVALUATION

Evaluation of the quotations received is based on the 80/20 preference point system as per PFMA regulation of 2022.

Specific Goal to be evaluated out of 20 Points:

SPECIFIC GOAL CRITERIA	POINTS
Race HDP (100% Black Equity Ownership)	10
Gender HDP (Women Equity Ownership is 51% or more)	4
Youth Equity Ownership (Youth Equity Ownership is 100%)	4
People with Disability	2
<b>TOTAL</b>	<b>20</b>

\*\*\* Enterprises that are not owned by historically disadvantaged person will be allocated 0 points.



3233 Nokukhanya Luthuli Street  
Groutville KwaZulu - Natal  
South Africa  
PO Box 1869,  
KWADUKUZA 4450  
tel. (032) 559 6822  
fax. (032) 559 6806  
email: [luthulimuseum@luthulimuseum.org.za](mailto:luthulimuseum@luthulimuseum.org.za)  
website: [www.luthulimuseum.org.za](http://www.luthulimuseum.org.za)

### **Claim for Specific Goals for 20 Points Allocation**

The 20 points will be applied as follow:

- a) If a Bidder is a Black company with a minimum of 100% Black Equity Ownership, 10 Points must be allocated. (If Black Equity Ownership is less than 100%, no points may be allocated)
- b) If HDP Women Equity Ownership is 51% or more, 4 Points must be allocated. (If Women Equity Ownership is less than 51%, no Points may be allocated).
- c) If Youth Equity Ownership is 100%, 4 Points must be allocated. (If Youth Equity Ownership is less than 100%, no Points may be allocated).
- d) If an entity has a Disabled Ownership 2 Points must be allocated. Proof must be submitted, in the form of Doctor's Notification of Disability. (If there is no Disabled Equity Ownership, no Points may be allocated).
- e) Points may be allocated cumulatively in respect of the above Four Groups under relevant circumstances, as set above.

### **Bidders must submit the following documents to claim points:**

- Certified ID copies of the company's directors as per the CIPC documents. (Certified copies must not be older than 3 months)
- CIPC Documents and or shareholder Certificate
- Medical Doctor certificate, for Disability confirmation.

**Failure on the part of a service provider to submit proof or documentation required in terms of this RFQ to claim points for specific goals will be interpreted to mean that preference points for specific goals are not claimed.**



3233 Nokukhanya Luthuli Street  
Groutville KwaZulu - Natal  
South Africa  
PO Box 1869,  
KWADUKUZA 4450  
tel. (032) 559 6822  
fax. (032) 559 6806  
email: [luthulimuseum@luthulimuseum.org.za](mailto:luthulimuseum@luthulimuseum.org.za)  
website: [www.luthulimuseum.org.za](http://www.luthulimuseum.org.za)

## SBD 4

### DECLARATION OF INTEREST

1. Any legal person, including persons employed by the state<sup>1</sup>, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes an advertised competitive bid, a limited bid, a proposal or written price quotation). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where-
    - the bidder is employed by the state; and/or
    - the legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.
  2. **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**
    - 2.1 Full Name of bidder or his or her representative: .....
    - 2.2 Identity Number:.....
    - 2.3 Position occupied in the Company (director, trustee, shareholder<sup>2</sup>, member): .....
    - 2.4 Registration number of company, enterprise, close corporation, partnership agreement or trust: .....
    - 2.5 Tax Reference Number: .....
    - 2.6 VAT Registration Number: .....
    - 2.6.1 The names of all directors / trustees / shareholders / members, their individual identity numbers, tax reference numbers and, if applicable, employee / PERSAL numbers must be indicated in paragraph 3 below.
- <sup>1</sup>"State" means –
- (a) any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);
  - (b) any municipality or municipal entity;
  - (c) provincial legislature;
  - (d) national Assembly or the national Council of provinces; or
  - (e) Parliament.
- <sup>2</sup>"Shareholder" means a person who owns shares in the company and is actively involved in the management of the enterprise or business and exercises control over the enterprise.



3233 Nokukhanya Luthuli Street  
Groutville KwaZulu - Natal  
South Africa  
PO Box 1869,  
KWADUKUZA 4450  
tel. (032) 559 6822  
fax. (032) 559 6806  
email: [luthulimuseum@luthulimuseum.org.za](mailto:luthulimuseum@luthulimuseum.org.za)  
website: [www.luthulimuseum.org.za](http://www.luthulimuseum.org.za)

- 2.7 Are you or any person connected with the bidder presently employed by the state? **YES / NO**
- 2.7.1 If so, furnish the following particulars:
- Name of person / director / trustee / shareholder/ member: .....
- Name of state institution at which you or the person connected to the bidder is employed : .....
- Position occupied in the state institution: .....
- Any other particulars:
- .....
- .....
- .....
- 2.7.2 If you are presently employed by the state, did you obtain the appropriate authority to undertake remunerative work outside employment in the public sector? **YES / NO**
- 2.7.2.1 If yes, did you attach proof of such authority to the bid document? **YES / NO**
- (Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the bid.
- 2.7.2.2 If no, furnish reasons for non-submission of such proof:
- .....
- .....
- .....
- 2.8 Did you or your spouse, or any of the company's directors / trustees / shareholders / members or their spouses conduct business with the state in the previous twelve months? **YES / NO**
- 2.8.1 If so, furnish particulars:
- .....
- .....
- .....
- 2.9 Do you, or any person connected with the bidder, have any relationship (family, friend, other) with a person employed by the state and who may be involved with the evaluation and or adjudication of this bid? **YES / NO**
- 2.9.1 If so, furnish particulars.
- .....



3233 Nokukhanya Luthuli Street  
Groutville KwaZulu - Natal  
South Africa  
PO Box 1869,  
KWADUKUZA 4450  
tel. (032) 559 6822  
fax. (032) 559 6806  
email: luthulimuseum@luthulimuseum.org.za  
website: www.luthulimuseum.org.za

.....  
.....

2.10 Are you, or any person connected with the bidder,  
aware of any relationship (family, friend, other) between any  
other bidder and any person employed by the state who may be  
involved with the evaluation and or adjudication of this bid?

YES/NO

2.10.1 If so, furnish particulars.

.....  
.....  
.....

2.11 Do you or any of the directors / trustees / shareholders / members  
of the company have any interest in any other related companies  
whether or not they are bidding for this contract?

YES/NO

2.11.1 If so, furnish particulars:

.....  
.....  
.....

### 3 Full details of directors / trustees / members / shareholders.

Full Name	Identity Number	Personal Income Tax Number	State Reference	Employee Number / Persal Number



3233 Nokukhanya Luthuli Street  
Groutville KwaZulu - Natal  
South Africa  
PO Box 1869,  
KWADUKUZA 4450  
tel. (032) 559 6822  
fax. (032) 559 6806  
email: [luthulimuseum@luthulimuseum.org.za](mailto:luthulimuseum@luthulimuseum.org.za)  
website: [www.luthulimuseum.org.za](http://www.luthulimuseum.org.za)

#### 4 DECLARATION

I, THE UNDERSIGNED (NAME).....

CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 2 and 3 ABOVE IS CORRECT. I  
ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME SHOULD THIS DECLARATION  
PROVE TO BE FALSE.

.....  
Signature

.....  
Date

.....  
Position

.....  
Name of bidder





3233 Nokukhanya Luthuli Street  
Groutville KwaZulu - Natal  
South Africa  
PO Box 1869,  
KWADUKUZA 4450  
tel. (032) 559 6822  
fax. (032) 559 6806  
email: [luthulimuseum@luthulimuseum.org.za](mailto:luthulimuseum@luthulimuseum.org.za)  
website: [www.luthulimuseum.org.za](http://www.luthulimuseum.org.za)

## SBD 6.1

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

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

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

#### 1. GENERAL CONDITIONS

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

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

1.2 **To be completed by the organ of state**

*(delete whichever is not applicable for this bid).*

a) The applicable preference point system for this bid is the 90/10 preference point system.

b) The applicable preference point system for this bid is the 80/20 preference point system.

c) Either the 90/10 or 80/20 preference point system will be applicable in this bid. The lowest/ highest acceptable bid will be used to determine the accurate system once Bids are received.

1.3 Points for this bid (even in the case of a bid 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 bid 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 Bidder to submit proof or documentation required in terms of this bid to claim points for specific goals with the bid, 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 Bidder, either before a bid 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

“bid” 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 bidding process or any other method envisaged in legislation;

- (a) **“price”** means an amount of money bid for goods or services, and includes all applicable taxes less all unconditional discounts;
- (b) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (c) **“bid 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
- (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 OR 90/10 PREFERENCE POINT SYSTEMS

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

$$P_S = 80 \left( 1 - \frac{Pt - P_{min}}{P_{min}} \right) \text{ or } P_S = 90 \left( 1 - \frac{Pt - P_{min}}{P_{min}} \right)$$

Where

Ps = Points scored for price of bid under consideration

Pt = Price of bid under consideration

Pmin = Price of lowest acceptable bid

### 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:

$$P_S = 80 \left( 1 + \frac{Pt - P_{max}}{P_{max}} \right) \text{ or } P_S = 90 \left( 1 + \frac{Pt - P_{max}}{P_{max}} \right)$$

Where

Ps = Points scored for price of bid under consideration

Pt = Price of bid under consideration

Pmax = Price of highest acceptable bid

#### 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 bid. For the purposes of this bid the Bidder will be allocated points based on



3233 Nokukhanya Luthuli Street  
Groutville KwaZulu - Natal  
South Africa  
PO Box 1869,  
KWADUKUZA 4450  
tel. (032) 559 6822  
fax. (032) 559 6806  
email: [luthulimuseum@luthulimuseum.org.za](mailto:luthulimuseum@luthulimuseum.org.za)  
website: [www.luthulimuseum.org.za](http://www.luthulimuseum.org.za)

the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this bid:

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 Bid Documents, stipulate in the case of—

- (a) an invitation for bid for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable bid will be used to determine the applicable preference point system; or
- (b) any other invitation for bid, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable bid 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 bid 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 Bidders: The Bidder must indicate how they claim points for each preference point system.)*

The specific goals allocated points in terms of this bid	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 Bidder)
Race HDP (Black Equity Ownership) (100% Black Equity Ownership)	10	
Gender HDP (Women Equity Ownership) (Women Equity Ownership is 51% or more)	4	
Youth Equity Ownership (Youth Equity Ownership is 100%)	4	
People with Disability	2	

#### 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



3233 Nokukhanya Luthuli Street  
Groutville KwaZulu - Natal  
South Africa  
PO Box 1869,  
KWADUKUZA 4450  
tel. (032) 559 6822  
fax. (032) 559 6806  
email: luthulimuseum@luthulimuseum.org.za  
website: www.luthulimuseum.org.za

☐ 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 bid, 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 bidding 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 Bidder 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.

	<p>.....</p> <p><b>SIGNATURE(S) OF BIDDER(S)</b></p>
<b>SURNAME AND NAME:</b>	.....
<b>DATE:</b>	.....
<b>ADDRESS:</b>	.....
	.....
	.....
	.....