TENDER BRIEFING SESSION

FOR THE APPOINTMENT OF A SERVICE PROVIDER TO DESIGN, LAYOUT AND PRINT THE TRANSNET CORPORATE PLAN FOR THE 2026/27, 2027/28 & 2028/29 FINANCIAL YEARS FOR PERIOD OF THREE (3) YEARS

TCC/2025/05/0005/96767/RFP

Compulsory RFP Briefing

Venue: MS-Teams – On-line

Presenters: Group Strategy & Planning

Group Supply Chain Management

07 August 2025

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Welcome and introductions

Group Strategy & Planning: Economic Strategy

Kamlesh Kanjee

Senior Specialist: Corporate Plan & Strategy Communication

William Mothibedi

Senior Specialist: Commercial Strategy

Mamorena Monare

Executive Secretary

Group Supply Chain Management

Nhlanhla Caluza

Strategic Sourcing Manager

Basetsana Moeng

Young Professional in Training

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Rules of engagement

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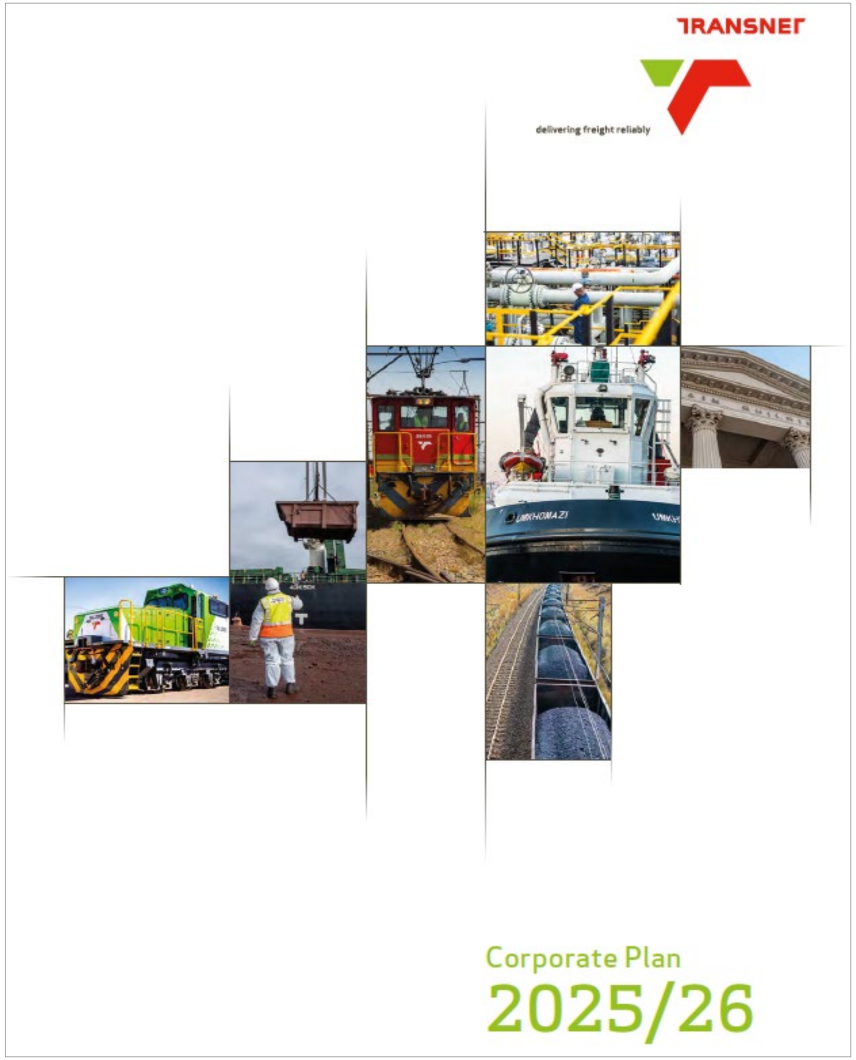
- This briefing session is **COMPULSORY**:
  - Respondents **failing to attend** the compulsory RFP briefing will be disqualified.
- An approximate **time allocation of 2 hours** has been catered for, the session could end sooner or later, depending on the volumes of clarification questions.
- An **opportunity for clarification questions and answers** will be provided after each briefing category.
- All questions will be recorded, and the answers will be consolidated and forwarded to all bidders whose attendance has been confirmed by Transnet. The aim is to provide the consolidated response within 48 hours after the session. Any additional clarification questions hereafter will only be accepted by Transnet until **12h00 on 12 August 2025.**
- Response to clarification questions will be provided to bidders via email.
- **All communication subsequent to this briefing session**, before the closing date and time, must only be directed to the **Nhlanhla.Caluza@transnet.net**
- A **copy of this presentation** will be **provided to all bidders** who **attended the meeting**.

Contents

What is the Corporate Plan?



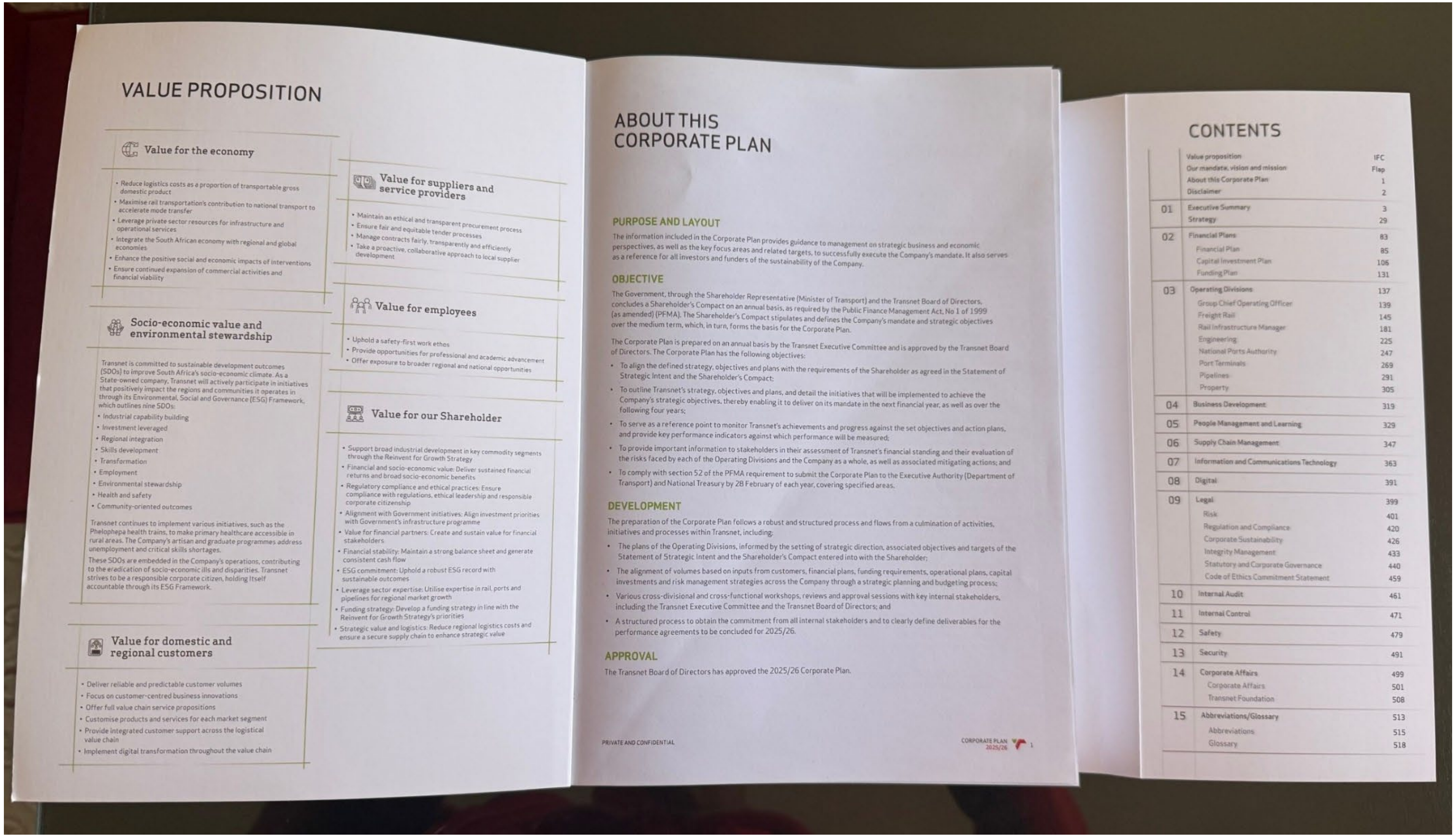
Internal confidential document

- The **Corporate Plan** is prepared on an annual basis by the Transnet Executive Committee and is approved by the Transnet Board.The Corporate Plan has the following objectives:
  - To **align the defined strategy, objectives and plans** with the requirements of the Shareholder as agreed in the Statement of Strategic Intent and the Shareholder's Compact;
  - To **outline Transnet's strategy, objectives and plans**, and detail the initiatives that will be implemented to achieve the Company's strategic objectives, thereby enabling it to deliver on its mandate in the next financial year, as well as over the following four years;
  - To **serve as a reference point** to monitor Transnet's achievements and progress against the set objectives and action plans, and provides key performance indicators against which performance will be measured;
  - To **provide important information to stakeholders** in their assessment of Transnet's financial standing and their evaluation of the risks faced by each of the Operating Divisions and the Company as a whole, as well as associated mitigating actions; and
  - To **comply with section 52 of the PFMA** requirement to submit the Corporate Plan to the Executive Authority (Department of Transport) and National Treasury at least one month before the start of the new financial year.

What the Corporate Plan looks like? (1/2)

What the Corporate Plan looks like? (2/2)

TRANSNET



VALUE PROPOSITION

Value for the economy

- Reduce logistics costs as a proportion of transportable gross domestic product
- Maximise rail transportation's contribution to national transport to accelerate mode transfer
- Leverage private sector resources for infrastructure and operational services
- Integrate the South African economy with regional and global economies
- Enhance the positive social and economic impacts of interventions
- Ensure continued expansion of commercial activities and financial viability

Socio-economic value and environmental stewardship

Transnet is committed to sustainable development outcomes (SDOs) to improve South Africa's socio-economic climate. As a State-owned company, Transnet will actively participate in initiatives that positively impact the regions and communities it operates in through its Environmental, Social and Governance (ESG) Framework, which outlines nine SDOs:

- Industrial capability building
- Investment leveraged
- Regional integration
- Skills development
- Transformation
- Employment
- Environmental stewardship
- Health and safety
- Community-oriented outcomes

Transnet continues to implement various initiatives, such as the Phelophepa health trains, to make primary healthcare accessible in rural areas. The Company's artisan and graduate programmes address unemployment and critical skills shortages.

These SDOs are embedded in the Company's operations, contributing to the eradication of socio-economic ills and disparities. Transnet strives to be a responsible corporate citizen, holding itself accountable through its ESG Framework.

Value for domestic and regional customers

- Deliver reliable and predictable customer volumes
- Focus on customer-centred business innovations
- Offer full value chain service propositions
- Customise products and services for each market segment
- Provide integrated customer support across the logistical value chain
- Implement digital transformation throughout the value chain

Value for suppliers and service providers

- Maintain an ethical and transparent procurement process
- Ensure fair and equitable tender processes
- Manage contracts fairly, transparently and efficiently
- Take a proactive, collaborative approach to local supplier development

Value for employees

- Uphold a safety-first work ethos
- Provide opportunities for professional and academic advancement
- Offer exposure to broader regional and national opportunities

Value for our Shareholder

- Support broad industrial development in key commodity segments through the Reinvent for Growth Strategy
- Financial and socio-economic value: Deliver sustained financial returns and broad socio-economic benefits
- Regulatory compliance and ethical practices: Ensure compliance with regulations, ethical leadership and responsible corporate citizenship
- Alignment with Government initiatives: Align investment priorities with Government's infrastructure programme
- Value for financial partners: Create and sustain value for financial stakeholders
- Financial stability: Maintain a strong balance sheet and generate consistent cash flow
- ESG commitment: Uphold a robust ESG record with sustainable outcomes
- Leverage sector expertise: Utilise expertise in rail, ports and pipelines for regional market growth
- Funding strategy: Develop a funding strategy in line with the Reinvent for Growth Strategy's priorities
- Strategic value and logistics: Reduce regional logistics costs and ensure a secure supply chain to enhance strategic value

ABOUT THIS CORPORATE PLAN

PURPOSE AND LAYOUT

The information included in the Corporate Plan provides guidance to management on strategic business and economic perspectives, as well as the key focus areas and related targets, to successfully execute the Company's mandate. It also serves as a reference for all investors and funders of the sustainability of the Company.

OBJECTIVE

The Government, through the Shareholder Representative (Minister of Transport) and the Transnet Board of Directors, concludes a Shareholder's Compact on an annual basis, as required by the Public Finance Management Act, No 1 of 1999 (as amended) (PFMA). The Shareholder's Compact stipulates and defines the Company's mandate and strategic objectives over the medium term, which, in turn, forms the basis for the Corporate Plan.

The Corporate Plan is prepared on an annual basis by the Transnet Executive Committee and is approved by the Transnet Board of Directors. The Corporate Plan has the following objectives:

- To align the defined strategy, objectives and plans with the requirements of the Shareholder as agreed in the Statement of Strategic Intent and the Shareholder's Compact;
- To outline Transnet's strategy, objectives and plans, and detail the initiatives that will be implemented to achieve the Company's strategic objectives, thereby enabling it to deliver on its mandate in the next financial year, as well as over the following four years;
- To serve as a reference point to monitor Transnet's achievements and progress against the set objectives and action plans, and provide key performance indicators against which performance will be measured;
- To provide important information to stakeholders in their assessment of Transnet's financial standing and their evaluation of the risks faced by each of the Operating Divisions and the Company as a whole, as well as associated mitigating actions; and
- To comply with section 52 of the PFMA requirement to submit the Corporate Plan to the Executive Authority (Department of Transport) and National Treasury by 28 February of each year, covering specified areas.

DEVELOPMENT

The preparation of the Corporate Plan follows a robust and structured process and flows from a culmination of activities, initiatives and processes within Transnet, including:

- The plans of the Operating Divisions, informed by the setting of strategic direction, associated objectives and targets of the Statement of Strategic Intent and the Shareholder's Compact entered into with the Shareholder;
- The alignment of volumes based on inputs from customers, financial plans, funding requirements, operational plans, capital investments and risk management strategies across the Company through a strategic planning and budgeting process;
- Various cross-divisional and cross-functional workshops, reviews and approval sessions with key internal stakeholders, including the Transnet Executive Committee and the Transnet Board of Directors; and
- A structured process to obtain the commitment from all internal stakeholders and to clearly define deliverables for the performance agreements to be concluded for 2025/26.

APPROVAL

The Transnet Board of Directors has approved the 2025/26 Corporate Plan.

PRIVATE AND CONFIDENTIAL

CORPORATE PLAN 2025/26 1

CONTENTS

What the Corporate Plan contains?

TRANSNET

CONTENTS

Scope of services and key deliverables (1/4)

TRANSNET

1. Design

- Design and concept (three options – final option selected includes Transnet recommendations)
- Infographics and icons x 30
- Bar graphs and pie charts x 25
- Risk heatmaps x 10
- Geographical maps x 25 (excluding supplied maps)

Transnet will provide all copies of information (content) required for the lay out of the Corporate Plan. The information will be supplied in PDF, MS-Word, MS-Excel, MS-PowerPoint, etc.

2. Production (inclusive of six proofs per chapter)

- Setting and layout (6-page cover + 518 pages)
- Dividers (30 divider pages – 15 leaves)
- PDFs of all chapters
- Interactive PDF of full Corporate Plan
- Presentation and production materials
- Proofreading and quality control by qualified proofreader (1 x full read and 1 full quality control read)
- Project and production management

The Service Provider must provide drafts and final version of the Corporate Plan in PDF format throughout the design process up to six (6) drafts.

Service Provider must make provision to allow a Transnet team to visit and perform draft review on Service Provider's premises throughout the development process.

Scope of services and key deliverables (2/4)

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3. Printing (First draft - Board and Exco copies - January)

Front cover acetate + 518 pages (259 leaves) text + backing board

- Weekday overtime print
- Size: 297mm (H) x 210mm (W)
- Quantity: 35
- Delivery: Deliver to one address in Johannesburg
- Printing and paper: 518 pages (259 leaves) printed CMYK both sides on Laser Preprint Cartridge, 100gsm, White
- Backing board: HI-Q Titan (Matt), 300gsm, White (not printed)
- Finishing: Collate into sets, trimmed to size, white wiro bind with clear acetate front and unprinted backing board

First print run

4. Printing (Final draft - Board and Exco copies - February)

Front cover acetate + 518 pages (259 leaves) text + backing board

- Weekday overtime print
- Size: 297mm (H) x 210mm (W)
- Quantity: 35
- Delivery: Deliver to one address in Johannesburg
- Printing and paper: 518 pages (259 leaves) printed CMYK both sides on Laser Preprint Cartridge, 100gsm, White
- Backing board: HI-Q Titan (Matt), 300gsm, White (not printed)
- Finishing: Collate into sets, trimmed to size, white wiro bind with clear acetate front and unprinted backing board

Second print run

Scope of services and key deliverables (3/4)

TRANSNET

5. Printing (Final Corporate Plan for Department of Transport and National Treasury – end February)

Custom-made box file and 518 pages (inside text)

- Delivery: Deliver to one address in Johannesburg

Custom-made box file

- Normal print
- Size: 400mm (H) x 680mm (W)
- Quantity: 15
- Printing and paper: Box file: Inner and outer sheets (x2) printed CMYK one side only on HI-Q Titan (matt), 148gsm, White
- Finishing: Matt lamination, one side only (inner and outer sheets), cosmetic mount printed laminated inner and outer sheets to 2300 micron boards, hinge in two places and fit 50mm 4 D-ring mechanism

Inside text pages only

- Weekday overtime print
- Size: 297mm (H) x 210mm (W)
- Quantity: 15
- Printing and paper: 518 pages printed CMYK both sides on Laser Preprint Cartridge, 100gsm, White
- Finishing: Collate into sets, trimmed to size, drill four holes, insert text into file

Third print run

Scope of services and key deliverables (4/4)

TRANSNET

6. Printing (Final Corporate Plan – Transnet copies - March)

6 page cover + 488 page text + 30 page dividers (15 leaves)

- Normal print
- Size: 297mm (H) x 210mm (W)
- Quantity: 240 (sequential numbering on last page of each Corporate Plan 1 to 240)
- Delivery: Deliver to one address in Johannesburg
- Printing and paper:
  - 6pp cover: Outer sheet printed CMYK, one side only on Magno Matt Satin (Matt), 150gsm, White
  - Front: Endpaper printed CMYK, one side only on Magno Matt Satin Matt), 150gsm, White
  - Back: Endpaper printed CMYK, one side only on Magno Matt Satin Matt), 150gsm, White
  - 488 pages: Text printed CMYK, both sides on Laser Preprint Cartridge, 150gsm, White
  - Dividers (15): Printed CMYK, one side only on Trucard 1 Matt, 300gsm, Premium White
  - Labels: Printed CMYK, one side only on Adestor Alto Brillo High Gloss Krisline, 80gsm, White (size: 47mm x 6mm)
- Finishing:
  - 6pp cover (outer): Matt laminate one side only
  - 6pp cover (outer): Spot Gloss UV varnish one side only
  - Dividers: Spot Gloss UV varnish one side only
  - Trimmed to size, thread sewn
  - Cosmetic mount printed laminated outer and printed endpapers to 2300 micron board
  - Right flap will go under front cover, 1 x magnet set (front cover x 1/flap x 1)
  - Tip in x15 dividers into book, dead and tail bands
  - Individually shrink-wrapped packets, which includes numbered labels on the book

Contents

Procurement process – Overview

- The tender was **advertised** on the **National Treasury Portal** www.etenders.gov.za and on the Transnet website.
- The RFP closing date and time is on **19 August 2025 at 16:00**.
- Late submissions will be disqualified.

- For **instructions** on the RFP submission:
  - Please refer to **RFP, Section 2 paragraph 3**.

- For **details of all returnable documents** that need to accompany your RFP submission:
  - Please refer to **RFP, Section 5, Returnable Documents**.

Procurement process – Evaluation methodology

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STAGE 1: TEST FOR RESPONSIVENESS

Step 1

Administrative and Substantive responsiveness

Returnable documents/schedules/ Pre-qualification

Technical Pre-qualification Criteria/minimum requirements/legal requirements

STAGE 2

Step 2

MINIMUM THRESHOLDS

Functionality/ technical
75 points
Minimum Threshold

Technical/functional criteria and weightings must be stipulated in the tender document

STAGE 3

Step 3

Weighted Scoring / 100***

Price (80)

Specific goals (20)

WEIGHTED SCORE

Step 4

Price negotiation if applicable (e.g. Market-related Price negotiation or Best And Final Offer

Step 5

Selection of the preferred bidder.

(Objective criterion to justify award to someone other than the highest ranked bidder must have been stated in the bid documents and can be used at this stage, if applicable)

Step 6

Award of business and conclusion of contract

Procurement process – Evaluation methodology: Steps 1 and 2

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FOR THE APPOINTMENT OF A SERVICE PROVIDER TO DESIGN, LAYOUT AND PRINT THE TRANSNET CORPORATE PLAN FOR THE 2026/27, 2027/28 & 2028/29 FINANCIAL YEARS FOR PERIOD OF THREE (3) YEARS

Step 1: Administrative & Substantive Responsiveness

Administrative responsiveness check	RFP Reference
• Whether the Bid has been lodged on time	Section 1 paragraph 3
• Whether all Returnable Documents and/or schedules [where applicable] were completed and returned by the closing date and time	Section 5
• Verify the validity of all returnable documents	Section 5
• Verify if the Bid document has been duly signed by the authorised respondent	All sections
• Whether the Bid contains a priced offer	Section 4 - Quotation Form
• Whether the Bid materially complies with the scope and/or specification given	All Sections
Check for substantive responsiveness	RFP Reference
• Whether the Bid contains a priced offer as prescribed in the pricing and delivery schedule	Section 4
• Whether the Bid contains a priced offer as prescribed in the pricing and delivery schedule	Section 4
• Whether the Bid materially complies with the scope and/or specification given	All Sections
• Bidder to attend the compulsory Briefing session	Section 2

The test for responsiveness [Step One] must be passed for a Respondent's Proposal to progress to Step Two for further pre-qualification

Step 2: Technical Evaluation

Minimum Threshold

= 75 points

Refer to relevant Annexures in "Returnable Documents Used for Scoring" in Section 5

Procurement process – Evaluation methodology: Step 2

Criteria 1

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Technical Evaluation Criteria	Reference	Maximum Points
Bidder's Experience Bidders must provide a maximum of five (5) signed client reference letters on an official client letterhead, demonstrating their experience in design, layout, production and printing of public strategic documents (corporate plans, business plans, strategic plans, annual reports or integrated reports) in excess of 150 pages over the past seven (7) years. Each reference letter must include the client's name, contact numbers, email address, a description of the work done that pertains to the strategic document/s (including the number of pages), duration of the contract and the client's experience of the bidder's quality of work. • No signed client reference letter provided **[0]** • 1-2 signed client reference letters that indicate the client's name, contact numbers, email address, a description of the work done that pertains to the strategic document/s (including the number of pages), duration of the contract and the client's experience of the bidder's quality of work **[9]** • 3 signed client reference letters that the indicate client's name, contact numbers, email address, a description of the work done that pertains to the strategic document/s (including the number of pages), the duration of the contract and the client's experience of the bidder's quality of work **[16]** • 4 signed client reference letters that indicate the client's name, contact numbers, email address, a description of the work done that pertains to the strategic document/s (including the number of pages), the duration of the contract and the client's experience of the bidder's quality of work **[23]** • 5 signed client reference letters that indicate the client's name, contact numbers, email address, a description of the work done that pertains to the strategic document/s (including the number of pages), the duration of the contract and the client's experience of the bidder's quality of work **[30]** **Please note:** Only signed client reference letters that **meet all the specified requirements** will be considered valid for evaluation purposes. To be deemed valid, each letter must: • Be on an official client letterhead; • Be signed by an authorised representative of the client; • Include the client's name, contact number and email address; • Provide a description of the work undertaken that pertains specifically to the design, layout, production, and printing of strategic documents (e.g. corporate plans, business plans, annual or integrated reports); • Specify the number of pages of the document(s); • Indicate the duration of the contract; and • Include the client's assessment of the bidder's quality of work. Any reference letter that **does not include all of the above** will be regarded as **non-compliant** and **will not be counted** toward the total number of valid reference letters for scoring purposes.	**Annexure E**	**30**

Procurement process – Evaluation methodology: Step 2

Criteria 2 (1/3)

Technical Evaluation Criteria	Reference	Maximum Points
Key Resources & Team's Experience Bidder to provide CV's showing capacity experience of the key resources as indicated below highlighting the resource's qualifications and experience in design, layout, production and printing of public strategic documents (corporate plans, business plans, strategic plans, annual reports or integrated reports) in excess of 150 pages. Bidder to provide an organogram of the team which will be handling the Transnet account demonstrating the seniority, capacity and experience of each team member. **Project Manager and key liaison with Transnet:** A minimum NQF Level 6 qualification with: • Less than 2 cumulative years of relevant experience as a project manager for public strategic documents in excess of 150 pages **[0]** • 2-4 cumulative years of relevant experience as a project manager for public strategic documents in excess of 150 pages **[2]** • 5-6 cumulative years of relevant experience as a project manager for public strategic documents in excess of 150 pages **[4]** • 7 or more cumulative years of relevant experience as a project manager for public strategic documents in excess of 150 pages **[5]** **Senior Creative:** A minimum NQF Level 5 qualification with: • Less than 2 cumulative years of relevant experience as a Senior Creative for public strategic documents in excess of 150 pages **[0]** • 2-4 cumulative years of relevant experience as a Senior Creative for public strategic documents in excess of 150 pages **[2]** • 5-6 years cumulative of relevant experience as a Senior Creative for public strategic documents in excess of 150 pages **[4]** • 7 or more cumulative years of relevant experience as a Senior Creative for public strategic documents in excess of 150 pages **[5]**	**Annexure F**	**25**

Procurement process – Evaluation methodology: Step 2
Criteria 2 (2/3)

Technical Evaluation Criteria	Reference	Maximum Points
<u>Key Resources & Team's Experience</u> Bidder to provide CV's showing capacity experience of the key resources as indicated below highlighting the resource's qualifications and experience in design, layout, production and printing of public strategic documents (corporate plans, business plans, strategic plans, annual reports or integrated reports) in excess of 150 pages. Bidder to provide an organogram of the team which will be handling the Transnet account demonstrating the seniority, capacity and experience of each team member. **Senior Typesetter 1:** A minimum NQF Level 4 qualification with: • Less than 2 cumulative years of relevant experience as a Senior Typesetter for public strategic documents in excess of 150 pages **[0]** • 2-4 cumulative years of relevant experience as a Senior Typesetter for public strategic documents in excess of 150 pages **[2]** • 5-6 cumulative years of relevant experience as a Senior Typesetter for public strategic documents in excess of 150 pages **[3]** • 7 or more cumulative years of relevant experience as a Senior Typesetter for public strategic documents in excess of 150 pages **[4]** **Senior Typesetter 2:** A minimum NQF Level 4 qualification with: • Less than 2 cumulative years of relevant experience as a Senior Typesetter for public strategic documents in excess of 150 pages **[0]** • 2-4 cumulative years of relevant experience as a Senior Typesetter for public strategic documents in excess of 150 pages **[2]** • 5-6 cumulative years of relevant experience as a Senior Typesetter for public strategic documents in excess of 150 pages **[3]** • 7 or more cumulative years of relevant experience as a Senior Typesetter for public strategic documents in excess of 150 pages **[4]** **Junior Typesetter:** A minimum NQF Level 4 qualification with: • Less than 1 cumulative years of relevant experience as a Junior Typesetter for public strategic documents in excess of 150 pages **[0]** • 1-3 cumulative years of relevant experience as a Junior Typesetter for public strategic documents in excess of 150 pages **[1]** • 4 or more cumulative years of relevant experience as a Junior Typesetter for public strategic documents in excess of 150 pages **[2]**	**Annexure F**	**25**

Procurement process – Evaluation methodology: Step 2
Criteria 2 (3/3)

TRANSNET

Technical Evaluation Criteria	Reference	Maximum Points
Key Resources & Team's Experience Bidder to provide CV's showing capacity experience of the key resources as indicated below highlighting the resource's qualifications and experience in design, layout, production and printing of public strategic documents (corporate plans, business plans, strategic plans, annual reports or integrated reports) in excess of 150 pages. Bidder to provide an organogram of the team which will be handling the Transnet account demonstrating the seniority, capacity and experience of each team member. **Proofreader:** A minimum NQF Level 6 qualification with: • Less than 2 cumulative years of relevant experience as a Proofreader for public strategic documents in excess of 150 pages **[0]** • 2-4 cumulative years of relevant experience as a Proofreader for public strategic documents in excess of 150 pages **[2]** • 5-6 cumulative years of relevant experience as a Proofreader for public strategic documents in excess of 150 pages **[3]** • 7 or more cumulative years of relevant experience as a Proofreader for public strategic documents in excess of 150 pages **[5]** **Please note:** • Only CVs and team information that meet the specified role-based requirements will be considered valid for evaluation purposes. Each submitted CV must: • Clearly indicate the full name, role/title, and proposed position on the project; • Reflect the individual's relevant qualifications, including the NQF level or equivalent; • Detail the cumulative years of relevant experience in the design, layout, production, and printing of public strategic documents (in excess of 150 pages); and • Be accompanied by a signed organogram showing the structure, reporting lines, and role seniority within the proposed team. • Any CV or team submission that does not meet these requirements in full will be considered non-compliant and excluded from scoring. Any reference letter that **does not include all of the above** will be regarded as **non-compliant** and **will not be counted** toward the total number of valid reference letters for scoring purposes.	**Annexure F**	**25**

Procurement process – Evaluation methodology: Step 2

Criteria 3

Technical Evaluation Criteria	Reference	Maximum Points
<u>Portfolio of Evidence – Public Strategic Documents</u> Bidders to provide case studies as evidence of public strategic documents in excess of 150 pages they have executed in the last seven (7) years for large organisations (>500 employees). Each case study must show the value of the contract, duration, name of the client and the public strategic document(s) developed for the client. Please share pictures of various elements done for the public strategic documents. Each case study should be in a PowerPoint presentation of no more than five (5) slides. • No case studies and no portfolio of evidence submitted **[0]** • 1-2 case studies that provides evidence which demonstrates design and development capabilities of public strategic documents in excess of 150 pages with a contract/project value of less than R500 000 per contract/project in the past seven years for large organisations (>500 employees). Case studies must be complemented with pictures of different design elements per contract/project **[10]** • 3-4 case studies that provides evidence which demonstrates design and development capabilities of public strategic documents in excess of 150 pages with a contract/project value from R500 001 to R1 200 000 per contract/project in the past seven years for large organisations (>500 employees). Case studies must be complemented with pictures of different design elements per contract/project **[20]** • 5 case studies that provides evidence which demonstrates design and development capabilities of public strategic documents in excess of 150 pages with a contract/project value greater than R1 200 000 per contract/project in the past seven years for large organisations (>500 employees). Case studies must be complemented with pictures of different design elements per contract/project **[25]** **<u>Please note:</u>** Only portfolio submissions that **demonstrate clear, relevant experience** in producing public strategic documents of a similar nature will be considered valid for evaluation. Each portfolio item must: • Be a completed project that is **strategy-focused** (e.g. corporate plans, business plans, annual reports, or integrated reports) for a large organisation (>500 employees) in the past seven years; • Be **in excess of 150 pages**; • Include supporting visuals or sample content that demonstrates the **design, layout, and production quality**; and • Specify the **client name, contract/project value** (if available). Submissions that do not meet these minimum criteria will be deemed **non-compliant** and will **not contribute to the portfolio evaluation score**.	**Annexure G**	**25**

Procurement process – Evaluation methodology: Step 2

Criteria 4 (1/2)

Technical Evaluation Criteria	Reference	Maximum Points
<u>The Approach & Methodology</u> Bidders to provide a detailed approach/methodology in the development of the required strategic document i.e. the Transnet Corporate Plan for the first year. The detailed approach/methodology should be presented in a PowerPoint presentation of no more than ten (10) slides and include the following: • **Project plan (milestones, resourcing) [3]** o No clear project plan provided [0] o Timeline or team details vague or incomplete [1] o General timeline and team structure provided, but limited detail on milestones [2] o Detailed project timeline with defined milestones, resource allocations and roles/responsibilities [3] • **Document design (themes, branding) [4]** o No relevant design theme or branding consideration [0] o Mention of design theme only, with little to no supporting detail [2] o Design theme included with partial visual references or limited brand alignment [3] o Proposed design theme aligns with Transnet branding; includes examples of colour palette, iconography and shows brand visibility [4] • **Content structure and user navigation [2]** o No meaningful structure or navigation guidance provided [0] o Structure outlined but limited to section headings or without user navigation [1] o Logical content breakdown (e.g., chapters/sections); includes user-friendly features like bookmarks and page referencing [2] • **Information display (font size, infographics, tables, headings, maps, heat maps, icons, etc.) [3]** o No approach to information display provided [0] o Minimal consideration of how data will be visually displayed [1] o General reference to visual presentation without detail or samples [2] o Clear strategy for presenting data visually (infographics, heat maps, charts); includes font hierarchy, icon use, and layout visuals [3] • **Layout and pagination strategy [2]** o No layout or pagination strategy included [0] o Layout principles discussed but not tailored to long-form reports [1] o Defined approach to layout design, section templates, pagination (front matter, main body) and design consistency [2]	**Annexure H**	**20**

Procurement process – Evaluation methodology: Step 2
Criteria 4 (2/2)

TRANSNET

Technical Evaluation Criteria	Reference	Maximum Points
<u>The Approach & Methodology</u> Bidders to provide a detailed approach/methodology in the development of the required strategic document i.e. the Transnet Corporate Plan for the first year. The detailed approach/methodology should be presented in a PowerPoint presentation of no more than ten (10) slides and include the following: • **Quality control (proofing, reviews, feedback loops) [3]** o No quality assurance process outlined [0] o Minimal quality assurance mention (e.g., just proofreading) [1] o Quality control approach included, but missing some steps or detail [2] o Comprehensive process including proofreading, client review checkpoints, tracked changes and error mitigation [4] • **Printing plan (capacity, timelines, quality assurance) [3]** o No printing plan provided [0] o Basic mention of printing with little to no operational detail [1] o General printing approach without quality assurance or contingency planning [2] o Describes print equipment, lead times, quality assurance checks (colour proofing, paper stock) and delivery readiness [3] **<u>Please note:</u>** The bidder's Approach & Methodology must be presented in a PowerPoint format of no more than **ten (10) slides** and must **address all required components** as listed in the evaluation criteria. These components include: • Project plan (milestones and resourcing) • Document design (themes and branding) • Content structure and user navigation • Information display (fonts, infographics, icons, etc.) • Layout and pagination strategy • Quality control (proofing, reviews, feedback loops) • Printing plan (capacity, timelines, quality assurance) Evaluation will be based on the **depth, clarity, and relevance of the content provided** under each element. Merely **mentioning an element without sufficient detail** may result in a **lower score**.	**Annexure H**	**20**
Total Weighting:		**100**

Procurement process – Evaluation methodology: Steps 3 – 6

- **Step 3**: Weighted scoring based on:
  - Price (80); and
  - Specific goals (20)
  - Only bidders who **have met Step 2** (75% threshold) will proceed to this step.

- **Step 4**: Price negotiations

- **Step 5**: Selection of preferred bidder

- **Step 6**: Award of business and conclusion of contract

Contents

Questions


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WHAT? HOW? WHY?
WHAT?
WHO?
WHERE?
HOW? WHO?
WHAT? HOW? WHY?
HOW?

SIYABULELA, THANK YOU!