



**KZN GROWTH FUND AGENCY  
REQUEST FOR QUOTATION (RFQ)  
RFQ REFERENCE NUMBER – KZNGFA – RFQ 2025-35  
2025/2026 INTEGRATED ANNUAL REPORT AND THE DESIGN OF THE  
ANNUAL PERFORMANCE & STRATEGIC PLAN**

Closing date : **19 MARCH 2026**  
Time : 12:00  
Submission format : email [scm@kzngf.co.za](mailto:scm@kzngf.co.za)

**Name of the respondent:** .....

Late bids will not be accepted

**BID DETAILS**

Bid title : Request for Quotation 2025/2026 Integrated Annual Report and The Design of The Annual Performance & Strategic Plan

Procurement Reference Number : KZNGFA – RFQ 2025-35

Description of Goods & Services : 2025/2026 Integrated Annual Report and The Design of The Annual Performance & Strategic Plan

Date of RFQ : 06 MARCH 2026

Date of RFQ CLOSING : **19 MARCH 2026**

**CONTACT INFORMATION**

Any enquiries regarding the bidding procedure may be directed to:

Procurement Officer: Sijabulile Ntshangase

Telephone: 031 372 3720

E-mail: [scm@kzngf.co.za](mailto:scm@kzngf.co.za)

**BIDDER’S DETAILS**

NAME OF BIDDER.....

POSTAL ADDRESS .....

STREET ADDRESS .....

CONTACT PERSON .....

TELEPHONE NUMBER Code ..... Number .....

CELL PHONE NUMBER Code ..... Number .....

FACSIMILE NUMBER Code ..... Number .....

E-MAIL ADDRESS .....

**Signature of Bidder .....** **Date .....**

## **1. PURPOSE**

The Kwazulu-Natal Growth Fund Agency (KGFA) invite quotations for the design of the electronic document of the 2025/2026 Integrated Annual Report, Annual Performance and Strategic Plan for the KwaZulu-Natal (KZN) Growth Fund Trust

## **2. BACKGROUND**

Kwazulu-Natal Growth Fund Agency (KZNGFA) is an Agency, established and capitalised by the Provincial Government to provide debt and equity. The main objective of the KZNGFA is to provide support for creating and enabling environment for activities that create jobs and accelerate the economic development of KZN whilst promoting Broad Based Black Economic Empowerment (B-BBEE).

### **2.1 Procurement Philosophy**

It is the policy of KGFA, when purchasing goods and obtaining services to follow a course of optimum value and efficiency by adopting best purchasing practices in supply chain management, ensuring that open and fair competition has prevailed, with due regard being given to the importance of:

- a) The promotion, development and support of businesses from disadvantaged communities (small, medium, micro enterprises, as well as established businesses within those communities) in terms of its BEE Policy;
- b) The promotion of national and regional local service providers and agents before considering overseas service providers and;
- c) The development, promotion and support for the moral values that underpin the above, in terms of KGFA Business Ethics and Guidelines which requires that all commercial conduct be based on ethical and moral values and sound business practice. This value system governs all commercial behaviour within KGFA.

The KGFA wishes to engage with service providers who are equally committed to maintain high quality services and better pricing

### 3. SCOPE OF SERVICES REQUIRED

Concept and design for 2025/2026 Integrated Annual Report and The Design of The Annual Performance & Strategic Plan.

#### 3.1 The prospective Service Provider will be required to:

- Align of the report with King IV, the Integrated Reporting Framework, PFMA requirements and National Treasury reporting standards
- Develop at least three initial design concepts before finalising the creative direction
- Professional edit and proofread the document before finalising
- Conduct numerical cross-checking of all financial tables, graphs and performance information
- Develop professional infographics and data visualisations for financial performance, risk, organisational structure and impact metrics
- Delivery of both print-ready files and web-optimised digital versions, including an interactive PDF or flipbook
- Submit all editable source files and artwork as they will become the property of KZNGFA upon final payment

#### 3.2 Design and typesetting/layout

- Research and usage of stock photos
- Writing (which includes):
  - Industry and company research.
  - Preparation of a language style guide;
- Interviews with relevant individuals
- Two working sessions (brainstorm sessions) (up to two hours each) to clarify content related matters;
- Drafting the report through a combination of interviews, completed templates as well as other documents and information received from KZNGFA;
- Typesetting and proofreading including all corrections up to and including supplying of a third proof
- Advice on additional improvement opportunities during the writing process
- Provide updated report content following internal reviews of the draft report, and up to four content-related touch-base meetings for each draft of the report;
- Proofread all documents and information provided for grammar, language, formatting or any inconsistencies.
- Editorial Support-from a language and technical perspective.
- Graphic design of the look and feel of 2025/2026 Integrated Annual Report ,Annual Performance & Strategic Plan.

#### 3.3 Cover Design

- On 250 gsm cocoon gloss (100% recycled) or suitable alternative
- Matt laminate, spot UV, silver foiled

#### 3.4 Flip book for website of the above

3.5 The number of pages;

- 2025/26 Integrated Annual Report - **140 pages**
- Annual Performance – **50 pages**
- Strategic Plan - **60 pages**

#### **4. CONTRACT DURATION**

Three (3) months from date of purchase order.

#### **5. AWARD OF THE RFQ**

KGFT is not obliged to accept and award this tender to the lowest bidder or any other bidder.

#### **6. EVALUATION PROCESS AND CRITERIA**

Selection will be conducted over three stages as detailed below:

**Stage 1 - Compliance with Minimum Requirements**

**Stage 2 – Functionality Evaluation**

**Stage 3 – Price and Specific Goals**

##### **6.1 STAGE 1 – COMPLIANCE WITH MANDATORY REQUIREMENTS**

6.1 All proposals must be completed and accompanied by:

6.1.1 Signed RFQ document bidders' details (page 2),

6.1.2 Company Profile,

6.1.3 The service provider must fully complete and sign SBD 1,4 and 6.1 documents.

6.1.4 Evidence of registration on the National Treasury Central Supplier Database (or proof of registration) must show Tax Compliance status.

**All bids duly lodged as specified in this RFQ will be examined to determine compliance with the mandatory requirements and conditions. Failure to provide any mandatory information as requested above will result in the submission being deemed non-responsive.**

## 6.2 STAGE 2 – FUNCTIONALITY EVALUATION

The bids will be evaluated for functionality based on the evaluation criteria and the minimum threshold as shown in the table below. Any bid that fails to meet the overall minimum threshold of **70%** will be disqualified for further evaluation on price and specific goals

No.	FUNCTIONAL EVALUATION CRITERIA	Weight										
1.	<p><b>Previous Industry Experience</b>  <b>The bidder must provide reference letters relating to the scope of work for this RFQ, demonstrating experience in having provided work of a similar nature by submitting five reference letters from clients for current and/or completed projects of a similar nature and value (must be within the last five (5) years).</b></p> <p><b>All reference letters must be on a client letterhead, dated, and signed by the client, not older than 5 years.</b>            Points will be allocated as follows:</p> <ul style="list-style-type: none"> <li>• 1 <b>reference</b> Letter – 5 points</li> <li>• 2 <b>reference</b> Letters – 10 points</li> <li>• 3 <b>reference</b> Letters – 15 points</li> <li>• 4 <b>reference</b> Letters – 20 points</li> <li>• 5 <b>reference</b> Letters or more – 25 points</li> </ul> <p><b>NB: Reference letters must be on the client’s letterhead, containing contact information such as email address, telephone/cell phone number, and name of signatory, and confirmation of work done.</b></p> <p><b>Note – The KZNGFA reserves the right to verify all reference letters.</b></p>	<b>25</b>										
2.	<p><b>Key Personnel/Resources Experience</b></p> <p>The service provider must submit their key resources <b>copies of CVs using Annexure A</b> and <b>copies of qualifications</b> demonstrating extensive knowledge and experience in putting together an integrated report and strategic plan from concept to design and printing / publication:</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 80%;">Less than 1 to 2 years of experience</td> <td style="text-align: right;">– 5 points</td> </tr> <tr> <td>2 to 4 years of experience</td> <td style="text-align: right;">– 10 points</td> </tr> <tr> <td>4 to 6 years of experience</td> <td style="text-align: right;">– 15 points</td> </tr> <tr> <td>6 to 8 years of experience</td> <td style="text-align: right;">– 20 points</td> </tr> <tr> <td>8 to 10 years of experience</td> <td style="text-align: right;">– 25 points</td> </tr> </table> <p>*The team’s experience shall be determined using a simple average whereby the aggregate experience of the team members in years is divided by the size of the team.</p> <p><b>Note: Failure to attach proof of qualifications will result in a score of zero.</b></p> <p><b>Failure to submit a one-page CV using Annexure A will result in a score of zero.</b></p>	Less than 1 to 2 years of experience	– 5 points	2 to 4 years of experience	– 10 points	4 to 6 years of experience	– 15 points	6 to 8 years of experience	– 20 points	8 to 10 years of experience	– 25 points	<b>25</b>
Less than 1 to 2 years of experience	– 5 points											
2 to 4 years of experience	– 10 points											
4 to 6 years of experience	– 15 points											
6 to 8 years of experience	– 20 points											
8 to 10 years of experience	– 25 points											

No.	FUNCTIONAL EVALUATION CRITERIA	Weight
3.	<p><b>Project Plan and Methodology</b></p> <p>The bidder must provide a detailed project plan and milestones: The plan should clearly define all phases, key activities, and milestones from start to finish.</p> <ol style="list-style-type: none"> <li>1. <b>Resource Allocation:</b> Demonstrates how personnel, tools, and Systems will be organised and utilized throughout the project.</li> <li>2. <b>Risk Management:</b> Identifies potential risks and provides strategies for mitigation.</li> <li>3. <b>Monitoring and Reporting:</b> Establishes mechanisms for tracking progress and communicating updates to Stakeholders.</li> </ol> <p>The bidder must show understanding of KZNGFA's specific requirements and tailor the implementation plan accordingly, i.e., the plan is fully customised to KZNGFA's needs.</p> <p>Points will be allocated as follows:</p> <ul style="list-style-type: none"> <li>• Methodology and approach outline all three of the highlighted elements = <b>50</b></li> <li>• Methodology and approach outline two of the elements = <b>30</b></li> <li>• Methodology and approach outline only one of the elements = <b>20</b></li> <li>• Methodology does not speak to any of the elements = <b>0</b></li> </ul>	<b>50</b>
	<b>TOTAL</b>	<b>100</b>

### 6.3 STAGE 3 – PRICE AND SPECIFIC GOALS

6.3.1 Proposals will be subject to an evaluation based on an 80/20 - 80 points for price and 20 points for specific goals.

6.3.2 Fixed price is required; price must be inclusive of VAT and all costs relating to disbursements and accommodation. See **Annexure B attached**.

Evaluation	Maximum points to be awarded
Relative competitiveness of the price	80
Specific Goals (see the below table)	20
<b>Total Price and Specific Goals</b>	<b>100</b>

## SPECIFIC GOALS TABLE

SPECIFIC GOAL		POINTS
<b>Black Ownership</b>	51% - 100 %	10
	30% - 50%	6
	5% - 29%	4
	0% - 4%	0
<b>Black Women Ownership</b>	51% - 100 %	4
	30% - 50%	2
	5% - 29%	1
	0% - 4%	0
<b>Black Youth Ownership</b>	30% - 100 %	3
	5% - 29%	2
	0% - 4%	0
<b>Disability</b>	30% - 100 %	3
	5% - 29%	2
	0% - 4%	0
<b>TOTAL POINTS</b>		<b>20</b>

The following may be used as proof for claiming preference points

- BBEE Certificate or BBEE Affidavit
- CSD Report
- ID Documents of the owners of the company
- Doctors Certificate / disability database from relevant institutions (for more research)

## 7. THE INFORMATION REQUIRED

You are required to provide the KZNGFA with a proposal, by **no later than 12:00pm on 19 MARCH 2026**

## 8. SUBMISSION DETAILS

- Submissions must be emailed to [scm@kzngf.co.za](mailto:scm@kzngf.co.za) attention **Sijabulile Ntshangase** by no later than the stipulated time above.
- For queries, you can contact **Nomusa Dube** [scm@kzngf.co.za](mailto:scm@kzngf.co.za) during business hours of 8:00am to 4:30pm, Monday to Friday on 031 372 3720.

Approved by



Lana Meyer  
Chief Financial Officer

## Curriculum Vitae

## 1. Role – Key Resource

Name and surname	
Residential Address	
Project Role	

## 2. Relevant Qualifications/Certifications

Name of Certificate	Institution	Year Obtained	Expiry Date (if any)

## 3. Relevant Experience

Company Name	Position	Key responsibility	Start Date	End Date

## 4. References

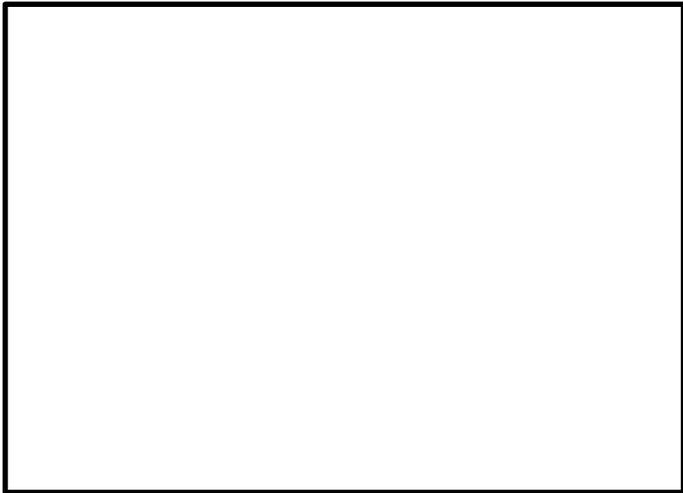
Name	Company Name	Position	Relationship

**NAME OF BIDDER:** \_\_\_\_\_

**OFFER TO BE VALID FOR 90 DAYS FROM THE CLOSING DATE OF RFP.**

<b>Number</b>	<b>Description</b>	<b>Total Price</b>
<b>1.</b>	<b>2025/2026 Integrated Annual Report - 140 pages</b>	
<b>2.</b>	<b>Annual Performance – 50 pages</b>	
<b>3.</b>	<b>Strategic Plan - 60 pages</b>	
<b>4.</b>	<b>Disbursements</b>	
<b>Sub-total</b>		
<b>VAT@ 15%</b>		
<b>Grand Total</b>		

**Tenderers signature**.....



**COMPANY STAMP**

**PART A  
INVITATION TO BID**

<b>YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)</b>					
BID NUMBER:	KZNGFA – RFQ 2025-35	CLOSING DATE:	19 March 2026	CLOSING TIME:	12pm
DESCRIPTION	2025/26 Integrated Annual Report and the Design of the Annual Performance & Strategic Plan				
<b>BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)</b>					
Via email to: <a href="mailto:scm@kzngf.co.za">scm@kzngf.co.za</a>					
<b>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO</b>			<b>TECHNICAL ENQUIRIES MAY BE DIRECTED TO:</b>		
CONTACT PERSON	Sijabulile Ntshangase		CONTACT PERSON	Nomusa Dube	
TELEPHONE NUMBER			TELEPHONE NUMBER		
FACSIMILE NUMBER			FACSIMILE NUMBER		
E-MAIL ADDRESS	<a href="mailto:scm@kzngf.co.za">scm@kzngf.co.za</a>		E-MAIL ADDRESS	<a href="mailto:scm@kzngf.co.za">scm@kzngf.co.za</a>	
<b>SUPPLIER INFORMATION</b>					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	[TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES &amp; QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]</b>					
<b>1</b>	ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]	<b>2</b>	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW ]
<b>QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS</b>					
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE A BRANCH IN THE RSA?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
<b>IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.</b>					

## PART B TERMS AND CONDITIONS FOR BIDDING

<b>1. BID SUBMISSION:</b>
<p>1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.</p> <p>1.2. <b>ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.</b></p> <p>1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.</p> <p>1.4. <b>THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).</b></p>
<b>2. TAX COMPLIANCE REQUIREMENTS</b>
<p>2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.</p> <p>2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.</p> <p>2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.</p> <p>2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.</p> <p>2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.</p> <p>2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.</p> <p>2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."</p>

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

SIGNATURE OF BIDDER: .....

CAPACITY UNDER WHICH THIS BID IS SIGNED: .....

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

DATE: .....

## BIDDER'S DISCLOSURE

### 1. PURPOSE OF THE FORM

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

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

### 2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling 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**

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

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1 the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

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

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or 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 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

<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.

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

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

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

### 1. GENERAL CONDITIONS

- 1.1 The following preference point systems are applicable to invitations to tender:
- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
  - the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).
- 1.2 **To be completed by the organ of state**  
(delete whichever is not applicable for this tender).
- a) ~~The applicable preference point system for this tender is the 90/10 preference point system.~~
- b) The applicable preference point system for this tender is the 80/20 preference point system.
- c) ~~Either the 90/10 or 80/20 preference point system will be applicable in this tender. The lowest/highest acceptable tender will be used to determine the accurate system once tenders are received.~~
- 1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:
- (a) Price; and
  - (b) Specific Goals.
- 1.4 **To be completed by the organ of state:**  
The maximum points for this tender are allocated as follows:
- |  | POINTS     |
|--|------------|
| <b>PRICE</b>                                     | 80         |
| <b>SPECIFIC GOALS</b>                            | 20         |
| <b>Total points for Price and SPECIFIC GOALS</b> | <b>100</b> |
- 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:

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

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

### 3.2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

#### 3.2.1. POINTS AWARDED FOR PRICE

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

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

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmax = Price of highest acceptable tender

#### 4. POINTS AWARDED FOR SPECIFIC GOALS

4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:

4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—

(a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or

(b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,

then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

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

*(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.*

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

The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Black Ownership	/	10	/	
Black Women Ownership		4		
Black Youth Ownership		3		
Disability		3		

**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.

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