



KZN GROWTH FUND AGENCY (KZNGFA) REQUEST FOR QUOTATION (RFQ)

ELECTRONIC BOARD MEETING SYSTEM SERVICES FOR 36 MONTHS

RFQ REFERENCE NUMBER: KZNGFA RFQ 2025 - 29

CLOSING DATE: 16 February 2026
TIME: 12pm
SUBMISSION FORMAT: E-mail: scm@kzngf.co.za

Name of the respondent:

NOTE: LATE BIDS WILL NOT BE ACCEPTED

BID TITLE: REQUEST FOR QUOTATIONS FOR THE PROVISION OF ELECTRONIC BOARD PACK SERVICES FOR 36 MONTHS.

PROCUREMENT REFERENCE NUMBER: **KZNGFA RFQ 2025 – 29**

DESCRIPTION OF GOODS & SERVICES: APPOINTMENT OF A SERVICE PROVIDER TO PROCURE AND COMMISSION AN ELECTRONIC BOARD MANAGEMENT SYSTEM FOR THE KZNGFA

DATE OF RFQ: **03 FEBRUARY 2026**

DATE OF RFQ CLOSING: **16 FEBRUARY 2026**

CONTACT INFORMATION: Any inquiries regarding the bidding procedure may be directed to:
Procurement Officer: Sijabulile Ntshangase

TELEPHONE: 031 372 3720

E-MAIL: scm@kzngf.co.za

BIDDER’S DETAILS

NAME OF BIDDER.....

POSTAL ADDRESS

STREET ADDRESS

CONTACT PERSON

TELEPHONE NUMBER Code Number

CELL PHONE NUMBER CodeNumber

FACSIMILE NUMBER Code Number

E-MAIL ADDRESS

Signature of Bidder **Date**

1. PURPOSE

The purpose of this Request for Quotation (RFQ) is to invite suitable service providers to submit proposals for the provision of an electronic board Management system (software and license subscription) for the KZNGFA for a period of 36 (thirty-six) months.

2. BACKGROUND

The KwaZulu-Natal Growth Fund Agency (the KZNGFA) is a Provincial Public Entity established in terms of section 3(1) of the KZNGFA Act to support the creation of an enabling environment for activities that generate 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 the KZNGFA, 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:

- 2.1.1 The promotion, development, and support of businesses from disadvantaged communities (small, medium, and micro-enterprises, as well as established businesses within those communities) in terms of its BEE Policy,
- 2.1.2 The promotion of national and regional local service providers and agents before considering overseas service providers; and
- 2.1.3 The development, promotion, and support for the moral values that underpin the above, in terms of the KZNGFA 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 behaviours within KZNGFA.

2.2 Supplier Due Diligence

- 2.2.1 The KZNGFA shall always be entitled to conduct bidder due diligence for short-listed bidders prior to final award or at any time during the contract period. This may include site visits if applicable.
- 2.2.2 The KZNGFA reserves the right to request the successful bidder and its staff to undergo security vetting and/or credit vetting processes via external service providers such as Credit Bureaus and the South African Police Services. By submitting a bid proposal, the bidder gives explicit approval for the KZNGFA to conduct such vetting requirements, when required.
- 2.2.3 The KZNGFA wishes to engage with service providers who are equally committed to maintaining high-quality services and better pricing.

2.3 Valid JV contract

In the event that the bidder(s) are entering into a joint venture or consortium, the joint venture agreement must be submitted.

3. PURPOSE AND OBJECTIVES OF THE PROJECT

The overall objective of this project is for the KZNGFA to improve governance, efficiency, and security in managing board meetings and documents. The specific objectives of this service, therefore, will include:

- 3.1. Provide an electronic Board Pack Software as per the below scope of work,
- 3.2. Role and user profile management,
- 3.3. Network offline operational capability,
- 3.4. Storage model,
- 3.5. Hardware requirements,
- 3.6. Licensing model, and

- 3.7. Cloud-based solution requires no desktop application.
- 3.8. Reporting capabilities as follows:
 - 3.8.1. Dashboard capabilities
 - 3.8.2. Notification and reporting capabilities
 - 3.8.3. SMS engine integration capabilities
 - 3.8.4. System exception log reports
- 3.9. Information security measures: o Data classification requirements (sensitive, secret, confidential, etc.)
- 3.10. Password formatting and expiry management
- 3.11. Data encryption methodologies
- 3.12. Certificate management.
- 3.13. Respondent must provide an OEM (original equipment manufacturer) reseller letter or certificate if they are not the OEM of the proposed solution. Failure to provide will result in automatic disqualification of the respondents' proposal.

4. SCOPE OF SERVICES REQUIRED

- 4.1 The KwaZulu-Natal Growth Fund Agency (KZNGFA) requires a service provider to submit Proposals to procure, set up, and configure an electronic Board meeting solution/system on the KZNGFA premises.
- 4.2 The required board meeting system should:
 - 4.2.1 Cater access for **30 users**, comprising Non-Executive and Executive Management, Senior Managers, and system administrators.
 - 4.2.2 Be able to fully facilitate the virtual and electronic record-keeping and distribution of Board meeting reports to all devices, including but not limited to mobile platforms, and should also support most modern web browsers-to ease the logistics of compiling the packs and improve overall governance within the KZNGFA.
 - 4.2.3 Be securely accessible by all users from any location and should support strong security features such as encryption or two-phase authentication. The system must be capable of providing enhanced security tools like remote locking.
 - 4.2.4 Allowing seamless virtual scheduling of meetings through an online, collaborative meeting space where you can include venue maps, agendas, attendee lists, meeting minutes, pre-and post-meeting actions, and add related documents, integration of capabilities with Microsoft Teams
 - 4.2.5 Provide for a function that allows one to easily collate meeting documents, including agendas, index, minutes, dividers, and page numbering, into one file.
 - 4.2.6 Allow all the system users-to perform annotations (highlight text, make notes, etc.), complete questionnaires, ask questions, vote, and sign off documents on their meeting packs, with or without Wi-Fi.
 - 4.2.7 Provide a centralised, collaborative platform where everyone can access and contribute to good decision-making by capturing all decisions made and making it easy to conduct surveys.
 - 4.2.8 Allow Board members to use its functions and content both online and offline and provide Board members with full access to minutes and resolutions.
 - 4.2.9 Customizable permissions for data access can be personalised down to the document level and user level to improve privacy and security.
 - 4.2.10 The system should have the ability to create virtual rooms for board committees or smaller groups to allow secure collaboration before and after meetings.
 - 4.2.11 The System must have data migration capabilities.
- 4.3 Through the deployment of this system, the KZNGFA wishes to achieve the following benefits:
 - 4.3.1 Administrative time and cost saving,
 - 4.3.2 Instant and secure distribution of meeting packs,

- 4.3.3 Collaborative, engaging, and easier to manage meetings,
- 4.3.4 Apps available for Apple, Android, and Windows devices,
- 4.3.5 Mitigation of risks through procedures, and
- 4.3.6 Transparency in decision-making procedures.

5. CONTRACT DURATION

The contract period is for thirty-six (36) months with an option to review for a further twelve (12) months, subject to performance review.

6. CONFIDENTIALITY OF THIS INFORMATION

- 6.1 All the information in this document must be considered confidential as per the POPI Act 4 of 2013, as amended requirements. Bidders are requested not to copy or forward this document or part thereof to any third party for any purpose other than to prepare for the response to this tender invitation.
- 6.2 The successful bidder will be required to enter into a non-disclosure agreement with KZNGFA.

7. AWARD OF THE RFQ

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

8. EVALUATION PROCESS AND CRITERIA

Selection will be conducted over three stages as detailed below:

Stage 1 - Compliance with Mandatory Requirements

Stage 2 - Functionality Evaluation

Stage 3 - Demo Presentation

Stage 4 – Price and Specific Goals

8.1 STAGE 1 – COMPLIANCE WITH MANDATORY REQUIREMENTS

- 8.1.1 All bidders must comply with the administrative requirements outlined in the Standard Bidding Documents and the mandatory requirements listed below. All bidders failing to provide the mandatory information and documentation in this stage 1 evaluation will be disqualified from further evaluation.
- 8.1.2 All quotations must be completed and accompanied by:
 - 8.1.2.1 Signed RFQ document bidders' details (page 2),
 - 8.1.2.2 Company Profile,
 - 8.1.2.3 The service provider must fully complete and sign SBD 1,4 and 6.1 documents.
 - 8.1.2.4 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.

8.2 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.

Responses will be evaluated based on the following functionality criteria and weights:

| No. | FUNCTIONAL EVALUATION CRITERIA | Weight | | | | | | | | | | |
|--------------------------------------|---|--------------------------------------|------------|----------------------------|-------------|----------------------------|-------------|----------------------------|-------------|-----------------------------|-------------|----|
| 1. | <p>Previous Industry Experience The bidder must provide reference letters related 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).</p> <p>All reference letters must be on a client letterhead, dated, and signed by the client, not older than 5 years. Points will be allocated as follows:</p> <ul style="list-style-type: none"> • 1 reference Letter – 5 points • 2 reference Letters – 10 points • 3 reference Letters – 15 points • 4 reference Letters – 20 points • 5 reference Letters or more – 25 points <p>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.</p> <p>Note – The KZNGFA reserves the right to verify all reference letters. At least 3 (three) signed contactable reference letters on a company letterhead confirming similar work done.</p> <p>The bidder should have relevant industry experience and expertise in similar business assignments. This should be evident from the company registration and company profile. NB: A company profile demonstrating industry experience must be provided as part of the bidder's response.</p> | 25 | | | | | | | | | | |
| 2. | <p>Key Personnel/Resources Experience</p> <p>The service provider must submit their key resources copies of CVs using Annexure A and copies of qualifications demonstrating extensive knowledge and experience in commissioning, implementing and supporting the client’s electronic board meeting management system:</p> <table style="width: 100%; border: none;"> <tr> <td style="padding-right: 20px;">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>Note: Failure to attach proof of qualifications will result in a score of zero.</p> <p>Failure to submit a one-page CV using Annexure A will result in a score of zero.</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 | 25 |
| 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 | | | | | | | | | | | |

| | | |
|----|--|------------|
| 3. | <p>Project Plan and Methodology</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"> 1. Resource Allocation: Demonstrates how personnel, tools, and Systems will be organised and utilized throughout the project. 2. Risk Management: Identifies potential risks and provides strategies for mitigation. 3. Monitoring and Reporting: Establishes mechanisms for tracking progress and communicating updates to Stakeholders. <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"> • Methodology and approach outline all three of the highlighted elements = 50 • Methodology and approach outline two of the elements = 30 • Methodology and approach outline only one of the elements = 20 • Methodology does not speak to any of the elements = 0 | 50 |
| | TOTAL | 100 |

Note: Failure to obtain a minimum of 70 out of 100 on functionality will result in disqualification from further evaluation.

8.3 STAGE 3 DEMO PRESENTATION

Bidders that meet the functionality/ technical criteria will be invited to give a demo presentation in order to assist the organisation to find a suitable solution. Bidders must achieve a minimum qualifying score of **70 points (70%)** in the presentation of a demo to be further evaluated Bidders must demonstrate their proposed solution by setting up a mock environment that allows KZNGFA representatives to walkthrough the functionality of the solution. The following key solution functionality must be demonstrated by the bidder:

| Functional requirements | | | Weighted score | | | | | | | | | |
|---|---|--------|----------------|-------------|--------|----|---|---|----|---|---|----|
| <p>Ease of navigation</p> <p>The system should have a clear interface with clear menus, logical workflows and easily accessible features to allow users to navigate the system with ease.</p> | | | 10 | | | | | | | | | |
| <p>System demonstration</p> <p>Provide a clear demonstration of all the elements as defined in the scope of work/services</p> <p>The required board meeting system should:</p> <table border="1" data-bbox="167 1626 1163 2040"> <thead> <tr> <th data-bbox="167 1626 338 1682"></th> <th data-bbox="338 1626 890 1682">Description</th> <th data-bbox="890 1626 1163 1682">POINTS</th> </tr> </thead> <tbody> <tr> <td data-bbox="167 1682 338 1865">1.</td> <td data-bbox="338 1682 890 1865">Cater access for 30 users, comprising Non-Executive and Executive Management, Senior Managers, and system administrators.</td> <td data-bbox="890 1682 1163 1865">2</td> </tr> <tr> <td data-bbox="167 1865 338 2040">2.</td> <td data-bbox="338 1865 890 2040">Be able to fully facilitate the virtual and electronic record-keeping and distribution of Board meeting reports to all devices, including but not limited to mobile</td> <td data-bbox="890 1865 1163 2040">2</td> </tr> </tbody> </table> | | | | Description | POINTS | 1. | Cater access for 30 users, comprising Non-Executive and Executive Management, Senior Managers, and system administrators. | 2 | 2. | Be able to fully facilitate the virtual and electronic record-keeping and distribution of Board meeting reports to all devices, including but not limited to mobile | 2 | 40 |
| | Description | POINTS | | | | | | | | | | |
| 1. | Cater access for 30 users, comprising Non-Executive and Executive Management, Senior Managers, and system administrators. | 2 | | | | | | | | | | |
| 2. | Be able to fully facilitate the virtual and electronic record-keeping and distribution of Board meeting reports to all devices, including but not limited to mobile | 2 | | | | | | | | | | |

| | | | | |
|-----|---|---|--|--|
| | platforms, and should also support most modern web browsers to ease the logistics of compiling the packs and improve overall governance within the KZNGFA. | | | |
| 3. | Be securely accessible by all users from any location and should support strong security features such as encryption or two-phase authentication. The system must be capable of providing enhanced security tools like remote locking. | 2 | | |
| 4. | Allowing seamless virtual scheduling of meetings through an online, collaborative meeting space where you can include venue maps, agendas, attendee lists, meeting minutes, pre-and post-meeting actions, and add related documents, integration of capabilities with Microsoft Teams | 2 | | |
| 5. | Provide for a function that allows one to easily collate meeting documents, including agendas, index, minutes, dividers, and page numbering, into one file. | 2 | | |
| 6. | Allow all the system users to perform annotations (highlight text, make notes, etc.), complete questionnaires, ask questions, vote, and sign off documents on their meeting packs, with or without Wi-Fi. | 2 | | |
| 7. | Provide a centralised, collaborative platform where everyone can access and contribute to good decision-making by capturing all decisions made and making it easy to conduct surveys. | 2 | | |
| 8. | Allow Board members to use its functions and content both online and offline and provide Board members with full access to minutes and resolutions. | 2 | | |
| 9. | Customizable permissions for data access can be personalised down to the document level and user level to improve privacy and security. | 2 | | |
| 10. | The system should have the ability to create virtual rooms for board committees or smaller groups to allow secure collaboration before and after meetings. | 2 | | |

| | | | | |
|--|---|---|--|-----------|
| 11. | The System must have data migration capabilities. | 2 | | |
| Through the deployment of this system, KZNGFA wishes to achieve the following benefits: | | | | |
| 12. | Administrative time and cost saving, | 3 | | |
| 13. | Instant and secure distribution of meeting packs | 4 | | |
| 14. | Collaborative, engaging, and easier to manage meetings, | 4 | | |
| 15. | Apps available for Apple, Android, and Windows devices, | 4 | | |
| 16. | Mitigation of risks through procedures and controls | 3 | | |
| TOTAL SCORE | | | | 50 |

Note: Failure to obtain the minimum of 70% of the maximum score on the Demo will result in disqualification from further evaluation. Bidders who obtain at least 70 points in stage 3 (Demo) will proceed to Stage 4 (Pricing)

8.4 STAGE - PRICE AND SPECIFIC GOALS

The 80/20 preference point system shall apply to this phase, where 80 points represent the maximum obtainable points for the lowest acceptable price, and 20 points represent the specific goals. The bid documentation's table below will award points to a bidder for achieving the specific goals.

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

8.4.2 A fixed price is required; the price must be inclusive of VAT and all costs relating to disbursements and accommodation. **See Annexure B**

| Evaluation | Maximum points to be awarded |
|---|------------------------------|
| The relative competitiveness of the price | 80 |
| Specific Goals (see the table below) | 20 |
| Total Price and B-BBEE Points | 100 |

SPECIFIC GOALS TABLE

| SPECIFIC GOAL | | POINTS |
|------------------------------|-------------|--------|
| Black Ownership | 51% - 100 % | 10 |
| | 30% - 50% | 6 |
| | 5% - 29% | 4 |
| | 0% - 4% | 0 |
| Black Women Ownership | 51% - 100 % | 4 |
| | 30% - 50% | 2 |
| | 5% - 29% | 1 |
| | 0% - 4% | 0 |

| | | |
|------------------------------|-------------|-----------|
| | | |
| Black Youth Ownership | 30% - 100 % | 3 |
| | 5% - 29% | 2 |
| | 0% - 4% | 0 |
| | | |
| Disability | 30% - 100 % | 3 |
| | 5% - 29% | 2 |
| | 0% - 4% | 0 |
| TOTAL POINTS | | 20 |

The following may be used as proof for claiming preference points:

- B-BBEE Certificate or B-BBEE Affidavit
- CSD Report
- ID Documents of the owners of the company
- Municipal Account or Lease Agreement
- Doctors' certificates/disability database from relevant institutions (for more research)

4 THE INFORMATION REQUIRED

You are requested to provide KZNGFA with a quotation by no later than **12h00** on the **16 February 2026**.

5 SUBMISSION DETAILS

- Submissions must be emailed to scm@kzngf.co.za with attention to **Sijabulile Ntshangase** by no later than the stipulated time above.
- **For queries, you can contact Thulisile Nxumalo at thulisile@kzngf.co.za during business hours of 08H00 am to 16H30 Monday to Friday on 031 372 3720.**

Approved by

Thulisile Nxumalo

Thulisile Nxumalo
Company Secretary

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.

| No. | Description | Quantity | Unit Price | Total Price |
|--------------------|---|-----------|------------|-------------|
| 1. | Implementation of electronic board meeting system | Once-off | | |
| 2. | Training after implementation for all users | Once-off | | |
| 3. | Support and maintenance | 36 Months | | |
| 4. | Licensing | 36 Months | | |
| 5. | Migration and handover of data to KZNGFA at the end of the contract | Once-off | | |
| 6. | *Other Costs | | | |
| Sub-total | | | | |
| VAT@ 15% | | | | |
| Grand Total | | | | |

***Other costs must be detailed**

Tenderer's signature.....



COMPANY STAMP

PART A: INVITATION TO BID

| | | | | | |
|--|--|--|--|---|---|
| YOU ARE HEREBY INVITED TO BID FOR THE REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY) | | | | | |
| BID NUMBER: | KZNGFA RFQ 2025 - 29 | CLOSING DATE: | 16 February 2026 | CLOSING TIME: | 12H00 PM |
| DESCRIPTION | ELECTRONIC BOARD MEETING SYSTEM FOR 36 MONTHS | | | | |
| BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS) | | | | | |
| Via email to scm@kzngf.co.za | | | | | |
| BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO | | | TECHNICAL ENQUIRIES MAY BE DIRECTED TO: | | |
| CONTACT PERSON | Sijabulile Ntshangase | | CONTACT PERSON | Thulisile Nxumalo | |
| TELEPHONE NUMBER | | | TELEPHONE NUMBER | | |
| FACSIMILE NUMBER | | | FACSIMILE NUMBER | | |
| E-MAIL ADDRESS | scm@kzngf.co.za | | E-MAIL ADDRESS | scm@kzngf.co.za | |
| SUPPLIER INFORMATION | | | | | |
| NAME OF BIDDER | | | | | |
| POSTAL ADDRESS | | | | | |
| STREET ADDRESS | | | | | |
| TELEPHONE NUMBER | CODE | | NUMBER | | |
| CELLPHONE NUMBER | | | | | |
| FACSIMILE NUMBER | CODE | | NUMBER | | |
| E-MAIL ADDRESS | | | | | |
| VAT REGISTRATION NUMBER | | | | | |
| SUPPLIER COMPLIANCE STATUS | TAX COMPLIANCE SYSTEM PIN: | | OR | CENTRAL SUPPLIER DATABASE No: | MAAA |
| 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 | |
| [A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED to QUALIFY FOR PREFERENCE POINTS FOR B-BBEE] | | | | | |
| 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] | 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] |
| QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS | | | | | |
| IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? | | | <input type="checkbox"/> YES <input type="checkbox"/> NO | | |
| DOES THE ENTITY HAVE A BRANCH IN THE RSA? | | | <input type="checkbox"/> YES <input type="checkbox"/> NO | | |
| DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA? | | | <input type="checkbox"/> YES <input type="checkbox"/> NO | | |
| DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA? | | | <input type="checkbox"/> YES <input type="checkbox"/> NO | | |
| IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? | | | <input type="checkbox"/> YES <input type="checkbox"/> NO | | |
| IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTERED AS PER 2.3 BELOW. | | | | | |

**PART B
TERMS AND CONDITIONS FOR BIDDING**

1. BID SUBMISSION:

- 1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
- 1.2. **ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED—(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.**
- 1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
- 1.4. **THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).**

2. TAX COMPLIANCE REQUIREMENTS

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

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

SIGNATURE OF BIDDER:

CAPACITY UNDER WHICH THIS BID IS SIGNED:
(Proof of authority must be submitted e.g. company resolution)

DATE:

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

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

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

2. Bidder's declaration

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

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

| Full Name | Identity Number | Name of State institution |
|-----------|-----------------|---------------------------|
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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:
.....
.....

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.

3 DECLARATION

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

- 3.1 I have read, and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect.
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement, or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, suspicious bids 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 |

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

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

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

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

1. GENERAL CONDITIONS

1.1 The following preference point systems apply 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 |
|--|------------|
| PRICE | 80 |
| SPECIFIC GOALS | 20 |
| Total points for Price and SPECIFIC GOALS | 100 |

1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals, with the tender will be interpreted to mean that preference points for specific goals are not claimed.

1.6 The organ of state reserves the right to require a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim regarding 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:

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

Where

- P_s = Points scored for the price of tender under consideration
- P_t = Price of tender under consideration
- P_{min} = Price of the 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:

$$\begin{array}{ccc} \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \end{array}$$

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

Where

- Ps = Points scored for the price of tender under consideration
 Pt = Price of tender under consideration
 Pmax = Price of the 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 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—
- 4.2.1 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
- 4.2.2 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,
- 4.2.3 The organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point systems.

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, qualify the company/ firm for the preference(s) shown, and I acknowledge that:

4.6.1 The information furnished is true and correct;

4.6.2 The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;

4.6.3 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;

4.6.4 If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of the contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –

4.6.4.1 disqualify the person from the tendering process;

4.6.4.2 recover costs, losses or damages it has incurred or suffered as a result of that person’s conduct;

4.6.4.3 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;

4.6.4.4 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

4.6.4.5 forward the matter for criminal prosecution, if deemed necessary.

| | |
|---|----------------|
| SIGNATURE(S) OF TENDERER(S) | |
| SURNAME AND NAME: | |
| DATE: | |
| ADDRESS: | |