

REQUEST FOR QUOTATION (RFQ)

TRADE & INVESTMENT KWAZULU-NATAL, IN COLLABORATION WITH DURBAN DIRECT (KWAZULU-NATAL ROUTE DEVELOPMENT COMMITTEE), INVITES PROPOSALS FROM QUALIFIED AVIATION SPECIALISTS TO DEVELOP BUSINESS CASES AIMED AT ATTRACTING AIRLINES TO KWAZULU-NATAL PROVINCE.

RFQ No.	RFQ202526/57
RFQ ISSUE DATE	31 OCTOBER 2025
BRIEFING SESSION	N/A
RFQ DESCRIPTION	REQUEST FOR QUOTATIONS: DEVELOPMENT OF BUSINESS CASES TO ATTRACT AIRLINES TO KWAZULU-NATAL
CLOSING DATE & TIME	21 NOVEMBER 2025 @ 12h00 PM
LOCATION FOR SUBMISSIONS	quotations@tikzn.co.za (PLEASE WRITE RFQ NUMBER ON THE EMAIL SUBJECT)

Bidders must submit responses via e-mail at: quotations@tikzn.co.za before or on the stipulated date and time. For any queries or questions, please use the above-mentioned email address.

Trade & Investment KwaZulu-Natal requests your quotation on the goods listed above. Please furnish us with all the information as requested and return your quotation on or before the date and time stipulated above. **Late and incomplete submissions will invalidate the quote submitted.**

Supplier Name: _____

Postal Address: _____

MAAA NO. (CSD No.): _____

Contact Person: _____

Telephone No.: _____

Fax No.: _____

Email Address: _____

Cell No.: _____

Signature of Bidder: _____

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DIRECTORS: Mr B M Myeni (Chairperson), Prof A T Nzama (Deputy Chairperson), Adv B N Buthelezi, Dr J Channing, Ms S Dlungwane, Mr B E Mkhize, Dr S K Mpungose, Dr S Ndlovu, Cllr M N Zulu, Mr R N Ngcamu (CEO), Mr T V Mhlongo (CFO), Mr Z Sibisi (Company Secretary)



DETAILED SPECIFICATION

REQUEST FOR QUOTATIONS: DEVELOPMENT OF BUSINESS CASES TO ATTRACT AIRLINES TO KWAZULU-NATAL.

1. INTRODUCTION

- 1.1 Trade & Investment KwaZulu-Natal is a South African trade and inward investment promotion agency, established as a Schedule 3C public entity, to promote the province of KwaZulu-Natal as an investment destination and to facilitate trade by assisting local companies to access international markets. In terms of the Public Finance Management Act, Act No.1 of 1999, as amended (PFMA), Trade & Investment KwaZulu-Natal must fully comply with all the requirements of the PFMA and all other relevant and applicable legislation.
- 1.2 Trade & Investment KwaZulu-Natal is governed by the KwaZulu-Natal Trade and Investment Agency Act, 2010 (Act No. 05 of 2010). In terms of Chapter 2 section 4 (1) of the KwaZulu-Natal Trade and Investment Act, the main functions of the entity are to:
- Identify, develop, market, and promote investment opportunities in the province to international and domestic investors;
 - Develop the export capacity of the province;
 - Develop the export market of the province;
 - Foster trade and investment within the province;
 - Develop a provincial investment and export plan for the development, promotion, and marketing of inward investments and exports from the province; and
 - Keep and maintain a database of investment opportunities within the province in such a manner as to benefit all sectors of the economy.
- 1.3 Trade & Investment KwaZulu-Natal has partnered with Durban Direct, a committee established and mandated by the Department of Economic Development, Tourism and Environmental Affairs, to collaboratively develop a comprehensive airlift strategy aimed at enhancing the province's air connectivity. This partnership focuses on attracting new domestic and international airlines to operate direct routes to KwaZulu-Natal, thereby promoting economic growth through increased trade, tourism, and investment.
- 1.4 To achieve these goals, Trade & Investment KwaZulu-Natal and Durban Direct are seeking to engage the services of a qualified aviation specialist. This expert will be responsible for researching, developing, and presenting robust, data-driven business cases tailored to potential airline partners. These business cases will provide strategic insights and financial justifications that support the establishment of new air services, aligning with the broader objectives of stimulating sustainable economic development within the province.

2. BACKGROUND

- 2.1. KwaZulu-Natal Province, through Trade & Investment KwaZulu-Natal and its partner entities, is committed to enhancing the province's air connectivity by attracting new domestic and international airlines to establish commercial flight routes. Improved air connectivity is a critical enabler for the province's economic growth, as it facilitates increased trade, stimulates tourism, attracts investment, and supports the broader agenda of sustainable economic development.

- 2.2. Recognising the competitive nature of airline route development, it is essential to present airlines with credible, data-driven business cases that clearly demonstrate the commercial viability and strategic benefits of operating routes to KwaZulu-Natal. These business cases will provide detailed insights into market demand, passenger and cargo potential, competitive positioning, and financial returns.
- 2.3. To achieve this, the province requires the expertise of an experienced aviation specialist who can lead the development of these business cases. The specialist's work will be supported by comprehensive market research and analysis, a deep understanding of the aviation industry and airline decision-making, and the application of robust financial modelling techniques. The outcome will be compelling, actionable business cases that effectively support negotiations with airlines and drive the successful establishment of new air services to KwaZulu-Natal.

3. PURPOSE

The primary purpose is to appoint an experienced aviation specialist to research, develop, and present compelling business cases tailored to specific airline prospects. These business cases will inform investment and route decisions and support negotiations between provincial stakeholders and airline operators. The key objectives to be achieved are:

- Collaborate with Trade & Investment KwaZulu-Natal and Durban Direct (Route Development Committee) to identify airlines with potential interest in establishing routes to KwaZulu-Natal.
- Conduct comprehensive market, demand, and competitive analyses.
- Develop financially viable and commercially persuasive business cases.
- Provide actionable recommendations to Durban Direct to facilitate airline route development to the province.

4. METHODOLOGY

The Service Provider/s proposal must outline the methodology they intend adopting to meet the deliverables specified in below. This outline should cover the following questions:

- Indicate how the project will be carried out.
- Provide a project charter with timelines.
- Provide a detailed budget for the project which must also outline a sign off and payment schedule.
- The Service Provider is expected to put clearly defined targets in line with the scope of work. The budget breakdown would therefore be linked to the target and outputs, milestones and timing thereof and the schedule of costs and payments.

5. SCOPE OF WORK /SERVICES

The Aviation Specialist shall undertake, but not be limited to, the following tasks:

5.1. Market and Demand Analysis

- Review current and historical passenger and cargo traffic data for KwaZulu-Natal airports.
- Analyze tourism and business travel demand trends impacting air travel.
- Identify underserved or unserved routes with market potential.
- Assess socio-economic and demographic trends influencing air travel demand.

5.2. Competitor and Network Analysis

- Map existing airline routes competing in the region from neighboring provinces and countries.
- Evaluate service quality, frequency, and pricing of competitors.
- Identify unique selling points and gaps in market coverage.

5.3. **Infrastructure and Operational Review**

- Assess infrastructure readiness (airport capacity, facilities, services).
- Identify any constraints or bottlenecks that could impact airline operations.
- Review relevant regulatory or bilateral air service agreements affecting route development.

5.4. **Airline Targeting and Engagement Strategy**

- Identify criteria for prioritizing airline prospects (route fit, fleet compatibility, market presence).
- Develop a shortlist of domestic and international airlines for targeted business cases.
- Design an engagement approach for each airline including incentives where appropriate.

5.5. **Business Case Preparation**

For each prioritized airline and targeted route, develop in-depth business cases including:

- Demand forecasting and justification.
- Financial feasibility models (costs, revenues, profitability scenarios).
- Risk assessment and mitigation strategies.
- Competitive positioning and value proposition.
- Recommendations on partnerships, marketing support, or incentive structures.

5.6. **Reporting and Presentation**

- Compile a detailed inception report outlining methodology and work plan.
- Provide interim progress reports at agreed milestones.
- Submit comprehensive business case documents.
- Prepare presentation decks for stakeholder and airline meetings.
- Facilitate a workshop or briefing session with project stakeholders to discuss findings.

6. **EXPERTISE AND COMPETENCIES**

Bidders must demonstrate relevant experience and capability to deliver the required services for airline attraction and business case development. Bidders should provide:

6.1. **Relevant Experience**

A proven track record in aviation business case development, airline route development, investment promotion, or related activities.

6.2. **Case Studies/Project Examples**

At least three (3) examples of comparable assignments undertaken in the last five (5) years focused on airline attraction, aviation sector investment projects, or transport infrastructure projects. Each example should clearly state the project scope, value, outcomes achieved, and the bidder's specific role and contributions.

6.3. **References**

Contactable references for the listed assignments including the reference's name, designation, organisation, email, and telephone number.

6.4. **Team Capability**

Profiles of proposed team members, emphasizing relevant qualifications and experience in aviation

economics, airline business case development, finance, legal advisory, investment structuring, stakeholder engagement, and project implementation related to air transport and route development.

7. BIDDERS' RESOURCES AND CAPACITY

Bidders must demonstrate they possess the appropriate resources and capacity to successfully develop a business case to attract airlines to the province. This includes:

7.1. Human Resources

A qualified team with expertise in aviation economics, airline business development, finance, legal aspects, investment structuring, stakeholder engagement, and project management. Detailed CVs of key personnel must be submitted, outlining their qualifications, relevant experience in aviation and airline attraction projects, and specific roles in this assignment.

7.2. Technical Resources

Access to tools, systems, and platforms necessary for market analysis, financial modelling specific to aviation projects, risk assessment, transaction structuring, and comprehensive reporting.

7.3. Institutional Capacity

Evidence of organisational capability to manage complex aviation-related projects involving multiple stakeholders, including provision of administrative, legal, and compliance support throughout the assignment.

7.4. Network and Partnerships

The aviation specialist must demonstrate established relationships with airlines, aviation authorities, and other relevant stakeholders. These connections should be leveraged to support and mobilise resources for developing and implementing airline attraction business cases.

8. OUTPUTS OF THE SERVICES PROVIDED/KEY DELIVERABLES

Notwithstanding key points in paragraph 6, the appointed service provider to deliver on the following deliverables:

- **Inception Report:** Including detailed workplan, methodology, and data sources (within 2 weeks of contract start).
- **Market and Competitor Analysis Report:** Comprehensive assessment of demand, trends, and competitive landscape.
- **Business Cases for Priority Airlines:** Minimum of 3 detailed business cases tailored to selected airline targets, to be agreed upon with the Durban Direct team
- **Presentations:** Professional slide decks for use in negotiations and stakeholder briefings.
- **Final Report:** Full summary of all analyses, business cases, and strategic recommendations.

9. REPORTING

The service provider will report to the following route development official Ms. Thulisile Galelekile

10. EVALUATION PROCESS

10.1 Phase 1: SCM Administrative requirements

- The service provider must submit proof of registration on CSD (Central Supplier Database)/SARS PIN.
- The service provider must submit company profile

- The SBD 4 form must be completed, and signed by the authorised company representative.
- The SBD1 form must be completed, and signed by the authorised company representative.
- The POPIA consent form must be completed, and signed by the authorised company representative.
- The bidder must submit SBD 6.1 preference points claim form.

Failure to provide the above information may lead to bidder's proposal not being considered further.

10.2 Phase 2: Functionality Criteria

- Only bid proposals that meet administrative requirements will be further evaluated on functionality criteria,
- The Bidder must score a minimum of **70%** during Phase 2 (functionality / technical) of the evaluation to qualify for Phase 3 of the evaluation where only points for Price and Specific Goals Scoring will be considered.
- N.B: Service providers that fail to score a minimum of 70/100 points (equivalent to seventy percent (70) on functionality will not be considered and evaluated further on phase 3- price.
- The service providers will be evaluated on functionality in accordance with the below functionality criteria and values:

GUIDELINES FOR CATEGORY CRITERIA	FUNCTIONALITY (GUIDELINES FOR CRITERIA APPLICATION)		WEIGHT
Number of Completed Similar Projects in the Government and Private Sector in the last Five (5) years. Reference letters must align with the Relevant Company Experience as per Company Experience Criteria Below and must include a positive performance rating (Excellent, Good, Satisfactory) based on the bidder's ability to successfully execute and complete the projects under consideration. TIKZN reserves the right to verify all reference letters submitted	The bidder must attach duly signed relevant reference letters to qualify for the indicated points.	Indicator	30
	This must be supported by references on your clients' letterhead and signed by the respective company representative including contact details (telephone numbers and emails addresses) and must not be more than 5 years old.		
	Letters of Award, Handover certificates, Completion Certificates and Appointment letters will not be considered as references.	0	
	2 relevant reference letters attached	10	
	3 relevant reference letters attached	20	
	4 relevant reference letters attached	30	
Qualifications and Experience of the Key resource. Copies of relevant qualifications and certificates must be provided. Provide a detailed CV that includes, names, length of experience, rank, qualifications and demonstrate experience in the following areas:	A dedicated resource to be assigned to the project must have: • Aviation, Transport Economics, Business development or related field • Clear demonstration of experience in route development, airline business case development, or aviation consultancy	Indicator	40
	A resource has a degree in Aviation or similar with 3 years' experience in the aviation sector	20	

GUIDELINES FOR CATEGORY CRITERIA	FUNCTIONALITY (GUIDELINES FOR CRITERIA APPLICATION)		WEIGHT
- Strong data analysis and presentation skills - Familiarity with aviation databases (e.g. Sabre, OAG etc.) - Excellent stakeholder engagement and negotiation capabilities Copies of relevant qualifications and certificates must be provided.	A resource has a degree in Aviation or similar with 4 years' experience in the aviation sector	30	30
	A resource has a degree in Aviation or similar with 5 years or more experience in the aviation sector	40	
Company Experience. The list must correspond with the client reference (Number of Completed Similar Projects in the Government and Private Sector) (Above)	The bidder must provide a list of between two (2) and four (4) projects or contracts completed within the last five years that demonstrate relevant experience in air services development, air transport strategy, or aviation consultancy. The list must include the name of client, date of award, status of contract, duration of contract, and client's contact details.	Indicator	
	Two (2) relevant projects/ contract in the last 5 years	10	
	Three (3) relevant projects/ contract in the last 5 years	20	
	Four (4) or more relevant projects/ contract in the last 5 years	30	
Total points on functionality			100

10.3 Phase 3: Price and Specific Goals Scoring

Pricing Considerations:

- Bidders' price quotations must be inclusive of all applicable taxes **(including VAT)**.
- Bidders total price weighs 80 points.

Specific Goals

- The bidder must submit SBD 6.1 preference points claim form.
- B-BEE Certificate / Affidavit.
- Bidders' specific goals weigh 20 points.

Specific Goals Criteria	Points
1. RDP Goals (Promotion of enterprises located in KZN province) = 10 points Companies not located in KZN will score 0 points. Proof of claim: Copy of a utility bill for property rates and services/ valid lease agreement/ original proof of residence signed by a Ward Councillor.	20
2. RDP Goals (Promotion of South African-owned enterprises = 06 points Companies not registered in South Africa will score 0 points. Proof of claim: CIPC registration (Companies and Intellectual Property Commission) / RSA Identity document of the director /CSD report.	
3. Ownership (Race)100% Black owned = 04 Points The bidder with less than 100% black ownership will score 0 points Proof of claim: RSA Identity document of the owners & CSD Registration Report.	

Total Points	20
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RFQ responses will be evaluated on the 80/20 Price & specific goals. Completed SBD 6.1. Preference Points Claim Form in terms of The Preferential Procurement Regulations 2022 must be completed and submitted.

NB: Tax matters for the recommended bidder will be verified on the Central Supplier Database (CSD) or SARS eFiling prior to awarding. If the bidders' tax matters are non-compliant in terms of clauses 4.2 & 4.3 will be exercised from National Treasury Instruction No. 09 of 2017/2018 (Tax Compliance Status Verification).

11. COMMUNICATION

All enquiries relating to this RFQ should be sent via email: quotations@tikzn.co.za

12. CONDITIONS TO BE OBSERVED WHEN RESPONDING TO RFQ

No RFQ shall be deemed to have been accepted unless and until a formal contract/letter of award/order form is prepared and executed. Quotation shall remain open for acceptance by Trade & Investment KwaZulu-Natal for a period of 90 days from the closing date of the RFQ Enquiry.

13. COST OF BIDDING

The service provider shall bear all costs and expenses associated with the preparation and submission of its RFQ, and Trade & Investment KwaZulu-Natal shall under no circumstances be responsible or liable for any such costs, regardless of, without limitation, the conduct or outcome of the bidding, evaluation, and selection process.

END OF RFQ DOCUMENT

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

- Quotation on a company letterhead.
- Completed and signed Declaration of Interest (SBD 4).
- Completed and signed Invitation to bid (SBD1 -Part A & B)
- Completed and signed POPIA consent form.
- Completed and signed preference points claim form (SBD6.1).
- Copy of CSD Report or MAAA Number (National Treasury).
- Information requested as per the administrative requirements.

Consent to Process Personal Information
in terms of
Protection of Personal Information Act No. 4 of 2013

(MANDATORY FOR ALL INTERACTIONS WITH TIKZN)

I, the undersigned _____
(Full Name and Surname)
(Hereinafter be referred to as the "Data Subject")

ID number _____
(If not available, date of birth & passport number)

Address _____

hereby give my consent to Trade & Investment KwaZulu-Natal (TIKZN), who is a Responsible Party¹ to process² my Personal Information for the following purposes:

	Providing me with advice, products and services that suit my needs as requested
YES	To conduct Central Supplier Database ("CSD") reference searches
YES	To process my applications and requests
	To notify me of new services, opportunities that may be of interest to me
YES	To confirm, verify and update my details
YES	To comply with any legal and regulatory requirements
	To conduct qualification verifications, credit checks, reference checks, criminal record checks, psychometric assessment and/or reporting to regulating authorities.
	Add further details of purposes:

I furthermore authorise TIKZN to verify my identity and any information I have provided. This personal information will not be shared with any third parties without my specific approval and will not be sold, distributed or leased to third parties unless my permission has been granted or required by law to do so.

I furthermore unconditionally indemnify TIKZN against any liability which results or may result from furnishing information in this regard.

TIKZN will not be liable for any damages of any kind arising from my use of their services, including but not limited to direct, indirect, incidental, punitive and/or consequential damages.

I further understand that should I not give my consent to the processing of my personal information for the purpose specified above, then TIKZN will not proceed with said purpose.

Signed at _____ on this ____/____/____
(Place) (Day) (Month)(Year) (Signature of Employee)

¹ "responsible party" means a public or private body or any other person which, alone or in conjunction with others, determines the purpose of and means for processing personal information;

² "processing" means any operation or activity or any set of operations, whether or not by automatic means, concerning personal information, including:
(a) the collection, receipt, recording, organisation, collation, storage, updating or modification, retrieval, alteration, consultation or use;
(b) dissemination by means of transmission, distribution or making available in any other form; or
(c) merging, linking, as well as restriction, degradation, erasure or destruction of information;

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 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 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

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.

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

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

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.

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

PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)									
BID NUMBER:		CLOSING DATE:			CLOSING TIME:				
DESCRIPTION									
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)									
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO					TECHNICAL ENQUIRIES MAY BE DIRECTED TO:				
CONTACT PERSON					CONTACT PERSON				
TELEPHONE NUMBER					TELEPHONE NUMBER				
FACSIMILE NUMBER					FACSIMILE NUMBER				
E-MAIL ADDRESS					E-MAIL ADDRESS				
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] ☐ Yes ☐ No			B-BBEE STATUS LEVEL SWORN AFFIDAVIT			[TICK APPLICABLE BOX] ☐ Yes ☐ No	
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]									
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?		☐ Yes ☐ No [IF YES ENCLOSE PROOF]			ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?			☐ Yes ☐ No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]	
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS									
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?							☐ YES ☐ NO		
DOES THE ENTITY HAVE A BRANCH IN THE RSA?							☐ YES ☐ NO		
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?							☐ YES ☐ NO		
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?							☐ YES ☐ NO		
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?							☐ YES ☐ 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 REGISTER 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:

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
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 of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

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

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

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

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

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

Where

- Ps = Points scored for price of tender under consideration
- Pt = Price of tender under consideration
- 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:

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

Where

- P_s = Points scored for price of tender under consideration
 P_t = Price of tender under consideration
 P_{max} = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system: or
 - (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,
- then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

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

(Note to 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 (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
	20	20
RDP Goals (Promotion of enterprises located in KZN province for work to be done or services to be rendered) Proof of claim: Copy of a utility bill for property rates and services/ valid lease agreement/ original proof of residence signed by a Ward Councillor.	10	
RDP Goals (Promotion of South African-owned enterprises) Proof of claim: CIPC registration (Companies and Intellectual Property Commission) / RSA Identity document of the director /CSD report.	06	
Ownership (Race)100% Black owned=04 Points Proof of claim: RSA Identity document of the director /CSD report/ID Copies of Directors/CSD Report	04	

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:

- 4.7. 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 because 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 because of having to make less favourable arrangements due to such cancellation.
 - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution, if deemed necessary.

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

SURNAME AND NAME:

DATE:

ADDRESS:

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