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REQUEST FOR QUOTATION (RFQ)

RFQ	RFQ/IT/2024/10244374/52
RFQ ISSUE DATE	29 JULY 2024
RFQ DESCRIPTION	APPOINTMENT OF A SUITABLE SERVICE PROVIDER TO PROVIDE GOVERNANCE AND RESEARCH ADVISORY SOLUTION, TO INCLUDE SUBSCRIPTIONS FOR ADVISORY SERVICES AND RESEARCH CONTENT FOR A PERIOD OF TWELVE (12) MONTHS
RFQ VALIDITY PERIOD	90 DAYS (COMMENCING FROM THE RFQ CLOSING DATE)
PREFERENCE POINT SYSTEM	80/20 80 (PRICE) AND 20 (SPECIFIC GOAL)
CLOSING DATE & TIME	09 AUGUST 2024 AT 12H00PM

Submissions must be emailed to: SABC RFQSubmissions@sabc.co.za on or before the closing date of this RFQ.

For queries, please contact **Vutivi Manganyi** on email tenderqueries@sabc.co.za

The SABC requests your quotation on the services listed above. Please furnish us with all the information as requested and return your quotation on the date and time stipulated above. Late and incomplete submissions will invalidate the quote submitted.

SUPPLIER NAME: _____

POSTAL ADDRESS: _____

TELEPHONE NO: _____

E MAIL ADDRESS: _____

CONTACT PERSON: _____

CELL NO: _____

SIGNATURE OF BIDDER: _____

NOTES ON QUOTATIONS AND PROPOSALS SUBMISSION

1. All electronic submissions must be submitted in a **PDF** format that is protected from any modifications, deletions, or additions.
 2. Financial/pricing information must be presented in a **separate** attachment from the Technical / Functional Response information.
 3. The onus is on the Bidder to further ensure that all mandatory and required documents are included in the electronic submission.
 4. All submissions should be prominently marked with the following details in the email subject line:
 - **RFQ Number and bidders' name.**
 5. Bidders are advised to email electronic submissions at least thirty minutes before the bid closing time to cater for any possible delay in transmission or receipt of the bid. The onus is on bidder to ensure that the bid is submitted on time via email
 6. Tender submission emails received after submission date and time will be considered late bid submissions and will not be accepted for consideration by SABC.
 7. SABC will not be responsible for any failure or delay in the email transmission or receipt of the email including but not limited to:
 - receipt of incomplete bid
 - file size
 - delay in transmission receipt of the bid
 - failure of the Bidder to properly identify the bid
 - illegibility of the bid; or
 - Security of the bid data.
- **NB: THE BIDDER SHOULD ENSURE THAT LINKS FOR WETRANSFER AND GOOGLE DROP BOX EXPIRE AFTER 30 DAYS OF THEIR SUBMISSIONS INSTEAD OF SEVEN DAYS.**

1. REQUIRED DOCUMENTS

- 2.1 Submit proof of CSD Registration (**Bidder must be registered with CSD to do business with the SABC**)
- 2.2 Proof of Valid TV License Statement for the Company; all active Directors and Shareholder must have valid TV Licenses.
(Verification will also be done by the SABC internally).
- 2.3 Valid SARS Tax Compliance Status Pin Issued to validate supplier's tax matters.
- 2.4 **Certified** copy of Valid BBBEE Certificate/Affidavit (from SANAS accredited Verification Agency)
Note: All section of BBBEE sworn affidavits must be completed in full. Please see guideline for validating BBBEE sworn affidavits.
- 2.5 Certified copy of Company Registration Document that reflect Company Name, Registration number, date of registration and active Directors or Members.
- 2.6 Certified copy of Shareholders' certificates.
- 2.7 Certified copy of ID documents of the Directors or Members.

NB: NO CONTRACT WILL BE AWARDED TO ANY BIDDERS WHO'S TAX MATTERS ARE NOT IN ORDER.

NO CONTRACT WILL BE AWARDED TO ANY BIDDERS WHO'S TV LICENCE STATEMENT ACCOUNT IS NOT VALID.

NO CONTRACT WILL BE AWARDED TO ANY BIDDER WHO IS NOT REGISTERED ON THE CSD

NOTE: SABC RESERVES THE RIGHT TO APPOINT MULTIPLE SUPPLIERS.

2. FIRST PHASE – COMPLIANCE TO MANDATORY REQUIREMENTS

N.B: We are looking for 5 individual subscriptions to governance and research portals which are mentioned below

Subscription	Description	Quantity	Yes/No
Executive Counselor Program Membership	• Dedicated Executive Counselor • Concierge Services • Industry Research-Deep insights tailored to Broadcast Media • Unlimited Price Benchmarking, • IT Vendor Negotiation Assistance • Full access to Diagnostic Programs • Unlimited Analyst Interactions • Workshops	Minimum 1 seat	
Advisory Membership	• Unlimited analyst calls • Full diagnostic access, • Virtual Industry Roundtable meetings, • Assistance with software selection engagement	Minimum 1 seat	
Reference/ Team Seat	• Access to core research content - project blueprints, • Access to learning management system, • Software selection content, tools and templates library	Minimum 3 Seats	

DETAILED TECHNICAL SPECIFICATION

3. BACKGROUND

Leaders face enormous pressure to stay ahead and grow profitably amid constant change. Lack of solutions and tools to enhance decision-making with expert guidance and insights, solutions that enable organizations to make more informed and strategic decisions. The governance and advisory solution serve as a strategic partner, guiding organizations through challenges, optimizing performance, and driving sustainable growth.

Staying compliant with relevant laws, regulations, and industry standards is crucial for the SABC. The governance and advisory solution will help navigate complex regulatory landscapes, reducing the risk of non-compliance and associated penalties. Research-driven Insights: Leveraging research capabilities, the solution provides data-driven insights into market trends, competitor analysis, customer behavior

, and emerging technologies. This will help SABC to stay agile, innovate, and stay ahead of the curve in a rapidly evolving landscape.

Our organization faces complex challenges in maintaining effective governance structures, ensuring regulatory compliance, and making data-driven strategic decisions. The Governance and Research Advisor will address these needs by providing expert advice, conducting in-depth research, and ensuring adherence to best practices and regulatory standards.

One of the key principles of Governance for the SABC is to identify, mitigate and manage the governance of risks within an organization by implementing internal controls that will work for the organizational structure and culture. This will be achieved by implementing best practice frameworks and processes that will be evaluated, reported and monitored to ensure compliance in the organization.

4. TECHNICAL REQUIREMENT/ SCOPE OF WORK

A Governance and Research Advisor Solution on Subscription-Based Services for Advisory Services and Research Content for a period of one year. Information Technology (IT) solutions and services required for the desired Information Technology research and advisory membership includes the following:

On-Line Research Portal: The IT research archive must include an extensive library and continually expanding collection of unclassified resources of practical down-loadable IT document templates, policies, job descriptions, quantitative analysis tools and business cases to help expedite daily tasks and improve the IT department's operational maturity and expanding technology scope. All research

is to be provided in PowerPoint, Word, and Excel. License holders will be able to customize the research for their own use. Each member is required to have a unique login credential and on-demand utilization reports should be provided. The licenses should also be transferrable at any time during the membership. Each member is to have the same access to all research on the web-portal with no restriction. Research can be shared internally throughout the organization without penalty. All research previously downloaded can continued to be used even if the contract term expires.

Talent Leadership Research: The IT/Information Security Unit requires research to effectively manage teams including topics such as workforce planning, sourcing, succession planning, employee engagement, coaching, employee development, and performance management. An on-line Academy (learning platform) is to be available to all IT staff that is based on the COBIT five (5) (Control objective for information and related Technologies) framework. The series of on-line courses should provide videos and research to help members receive certifications in core IT processes. IT leaders should have the ability to assign courses through the on-line portal and track progress.

Control and Processes: IT / Information Security with require the Governance and Research Solution that will assist in the establishment of new policies which include but not limited to: Ethical Application of Artificial Intelligence Policy, Cloud Policy, Privacy Policy, Classification implementation, and Clear Desk and Clear Screen Policy. There are currently various policies and processes used in the management of IT that are reviewed every three years to ensure that they are aligned with current processes used in the management of IT. The SABC has adopted COBIT, ISO 27001, King IV and ITIL etc to build a strong foundation for operational excellence, risk management, and continuous improvement in the IT environment.

5. RFQ Validity Period

This bid will remain valid **90 (ninety) days** from the date of bid closing.

6. Costing

The quotation must reflect a detailed cost breakdown and any indirect costs associated with the delivery of the required service.

7. Contract Documentation

- Twelve (12) months.

8. Location

SABC Auckland Park

9. SECOND PHASE: EVALUATION COMPLIANCE TO THE SCOPE OF REQUIREMENTS

Bidders need to comply with at least eight (8) requirements, and indicate the pages and references on where to find the information to ensure compliance, as mentioned below:

NO	REQUIREMENTS	COMPLY	NOT COMPLY	COMPLIANCE RESPONSE PAGE REFERENCE ON THE COMPANY PROFILE
1	Consulting level programs that focuses on stakeholder and business alignment: The IT department is particularly interested in consulting level programs that focus on stakeholder and business alignment. This program would be administered by the contractor and would develop the IT strategy in conjunction with the vision and business goals of the Executive and Senior leadership team			
2	Internal Diagnostic/ Benchmarking Programs & Surveys: Members to have access to governance, cybersecurity industry coverage including reference architectures, industry IT metrics/benchmarking reports, industry notes covering the latest trends and top-of-mind industry IT challenges.			
3	The IT staff needs metrics to make informed IT decisions. The vendor must be able to conduct internal IT diagnostic programs across Applications, Infrastructure, Management, Strategy and Leadership topic areas In form of a survey. These surveys should also include annual IT budget benchmarking. (Bidders to provide the sample of the survey that they have done before)			
4	The service provider shall offer an IT Management Dashboard accessible by the members that summarizes metrics from diagnostic and benchmarking programs completed. Bidders must provide the an example of a dashboard of the above mentioned points. 5 Points)			
5	Contracts Evaluations and Reviews: Members will also be able to submit custom questions to analysts regarding vendor evaluations			

	to gain greater insight. It is expected that the selected vendor will perform unlimited contract reviews. The vendor is to review the contract in its entirety (i.e. no page limits). The Analyst that reviews the contract is to be available in an unlimited fashion to discuss the contract.			
6	The IT/ information Security Unit also requires the vendor to provide this Guided Implementation service via a series of advisory calls with a subject matter expert and the interested IT member within the department's staff to ensure successful project completion at every impactful step of the process.			
7	More than 200 Analysts would be deemed necessary to ensure comprehensive coverage of the IT topic areas. There is to be no limit on the number of analyst calls during the contracts.			
8	Up to three members of the SABC IT Team will require regular analyst calls during the contracts.			
9	Each of the three members will be assigned an Executive Advisor to work through key initiative plans specific to their role.			
10	Concierge Service: - It is expected that the solution will provide one day consulting engagements designed to be delivered online or onsite. - These are to be tailored to the needs of SABC and are built to provide practical, custom solutions to real pain points experienced by IT leaders. - A team of analysts to spend a ½ day to discover the current state, complete document reviews, gather data and then build and create custom deliverables they will present while they share their findings to help members act and plan next steps. These services should have a one-day turnaround			

10. THIRD PHASE: FUNCTIONALITY EVALUATION CRITERIA

10.1 Functional Evaluation

- i. The tender submission will be technically evaluated out of **100 points**.
- ii. A threshold of **80** out of **100** has been set.
- iii. All bidders achieving less than the set threshold of **80 points out of 100 points** will not proceed to the next phase and not be evaluated for **Price & Specific goals**.

- iv. SABC further reserves the right not to award this RFQ to any bidder based on the proven poor record of accomplishment of the bidder in previous projects within the SABC.

No.	FUNCTIONALITIES	Minimum Points	Maximum Points
1.	Control and Processes: IT / Information Security with require the Governance and Research Solution that will assist in the establishment of new policies, namely: Ethical Application of Artificial Intelligence Policy, Cloud Policy, Privacy Policy, Classification implementation, and Clear Desk and Clear Screen Policy. There are currently various policies and processes used in the management of IT that are reviewed every three years to ensure that they are aligned with current processes used in the management of IT. The SABC has adopted COBIT, ISO 27001, King IV, NIST, COSO and ITIL , etc to build a strong foundation for operational excellence, risk management, and continuous improvement in the IT environment. Below three standards (0 points) Minimum three standards (10 points) More than three standards (15 points)	10	15
2.	On-Line Research Portal: - The IT research archive must include an extensive library and continually expanding collection of unclassified resources of practical down-loadable IT document templates, policies, job descriptions, quantitative analysis tools and business cases to help expedite daily tasks and improve the IT department's operational maturity and expanding technology scope. (10) points - All research is to be provided in PowerPoint, Word, and Excel. License holders will be able to customize the research for their own use. Each member is required to have a unique login and on-demand utilization reports should be provided. (5) points - The licenses should also be transferrable at any time during the membership. Each member is to have the same access to all research on the web-portal with no restriction. (5) points - Research can be shared internally throughout the organization without penalty. All research previously downloaded can continued to be used - even if the contract term expires (5) points Non compliance (0) points N.B Bidders are required to score the full 25 points. Bidders are to provide detailed manuals for the above mentioned points (specify the page numbers)	25	25
3.	Talent Leadership Research:	10	15

	- The IT/Information Security Unit requires research to effectively manage teams including topics such as workforce planning, sourcing, succession planning, employee engagement, coaching, employee development, and performance management. (5 Points) - An on-line Academy (learning platform) is to be available to all IT staff that is based on the COBIT framework. The series of on-line courses should provide videos and research to help members receive certifications in core IT processes. IT leaders should have the ability to assign courses through the on-line portal and track progress. (5 Points) 4/5-Day On-Site Workshop: - The vendor shall provide a one-week workshop annually on any IT topic published on the web-portal. Workshops will be designed as a collaborative exercise with the IT Team at The SABC to accelerate a current IT initiative or process (e.g. Develop an IT Security Strategy). The Workshop will take place at the SABC's office. (5 points) Bidders must provide training plan and the learning platform		
4.	Technical Approach: - Proposed implementation plan to meet SABC requirements to develop and implement new and review existing policies. (15 points) Guided Implementation Assistance: - The IT/ Information Security Unit requires a service that will provide step-by-step assistance via published research to assist members through each critical stage of the desired IT project, complete with full-service tool kits, process plans, roadmaps, and project milestone check-ins. (5 Points) Bidders to provide the project plan indicating the above (20 points)	15	20
5.	Dedicated Account Manager: The IT/ Information Security Unit requires a dedicated resource on behalf of the successful vendor to manage the membership and subscription services. This dedicated resource should be the main point of contact for any membership, research or general requests put forth (10 Points) Bidders to provide the CV of the account manager who will handle the SABC account indicating the above:	10	10
6.	An integrated IT research and advisory platform reports: Three reference letters in the client letterhead describing the proposed solution (the governance and research advisory solution) from current and previous and must contain the following.	10	15

	✓ Contract description ✓ Duration of contact ✓ Contact details ✓ Contract Period (within 3 year period – from 2021 to 2024) ✓ Letter Head must be signed by the client More than 3 letters from different clients = 15 points Only 3 letters from different clients = 10 points Less than 3 letters from different client(s) = 0 points		
	Total threshold Points is = 80/100	80	100

11. PRICE AND SPECIFIC GOALS

- 7.1 The 80/20 preference point system will apply to evaluate responses.
- 7.2 The award of the tender / RFQ to will be based on functionality evaluation.
- 7.3 The Price and BEE (Specific goals) will be applicable to award the highest scoring bidder.

12. PRICE AND BEE (SPECIFIC GOALS) APPLICATION DURING CONTRACT IMPLEMENTATION

8.1 PRICE

The **80/20** preference point system

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

$$Ps = 80 \left(1 - \frac{Pt - Pmin}{Pmin} \right)$$

Where:

- Ps = Points scored for comparative price of bid under Consideration
- Pt = Comparative price of bid under consideration
- Pmin = Comparative price of lowest acceptable bid

8.2 BEE (SPECIFIC GOALS)

SPECIFIC GOALS	80/20
EME/SME 51% owned by Black people	10
51% owned by Black people;	5
51% owned by Black people who are women	3
Black Youth	2

NB: All tenders will be issued to the market with all specific goals, and these will be scored in accordance with the evidence as submitted by the bidder. The bidder who does not meet the specific goals will not be disqualified but score zero.

9 ADJUDICATION USING A POINT SYSTEM

- 9.1 The bidder obtaining the highest number of total points will be awarded the contract
- 9.2 Preference points shall be calculated after process has been brought to a comparative basis taking into account all factors of non-firm prices.
- 9.3 Should two or more bids be equal in all respects, the award shall be decided by the drawing of lots.

10 OBJECTIVE CRITERION

- The SABC reserves the right not to award this tender to any bidder based on the proven poor record of accomplishment of the bidder in previous projects within the SABC.
- The SABC will not award contract/s to the bidders who are blacklisted or have committed other acts of fraud and misrepresentation of facts e.g., tax compliance, company financials, etc. will be eliminated from the bid process.
- The SABC reserves the right not to award this tender to any bidder who fails the financial stability assessment.
- No SABC former employees shall be awarded contracts with the SABC within 24 months after termination of employment with the SABC.
- Should employees resign or retire from the employment of the SABC and become directors of other businesses tendering with the SABC, such tender shall not be considered until the cooling off period of 24 (twenty-four) months has expired.
- Should the employee be dismissed from the SABC employment, such an employee shall be prohibited from conducting business with SABC for a period of 5 (five) years from the date of dismissal.
- Should the employee be found guilty in a court of law due to criminal conduct/act, such employee will not be considered to do/conduct business with SABC, until the criminal record has been legally expunged.
- The SABC shall not procure any goods, services, works or Content from any Board member or Board member owned business, to ensure that suppliers competing for the SABC's business have confidence in the integrity of SABC's selection process.
- Should the SABC's Board members no longer serve on the SABC Board but become directors of other companies, the SABC shall not conduct business with those companies until the cooling off period of 24 (twenty-four) months has expired.
- Should the Board member be found guilty in a court of law due to criminal conduct/act, such Board member will not be considered to do/conduct business with SABC, until the criminal record has been legally expunged.
- The SABC shall not procure any goods, services, works or Content from any independent contractor or independent contractor owned business, to ensure that suppliers competing for the SABC's business have confidence in the integrity of SABC's selection process.
- Should the Independent Contractor no longer be contracted to the SABC but become directors of other companies, the SABC shall not conduct business with those companies until the cooling-off period of 24 (twenty-four) months has expired.
- Should the Independent Contract be found guilty in a court of law due to criminal conduct/act, such employee will not be considered to do/conduct business with SABC, until the criminal record has been legally expunged

11 COMMUNICATION

Respondents are warned that a response will be disqualified should any attempt be made by a tenderer either directly or indirectly to canvass any officer(s) or employees of SABC in respect of a tender, between the closing date and the date of the award of the business.

All enquiries relating to this RFQ should be emailed **three days** before the closing date.

12 CONDITIONS TO BE OBSERVED WHEN TENDERING

- The Corporation does not bind itself to accept the lowest or any tender, nor shall it be responsible for or pay any expenses or losses which may be incurred by the Tenderer in the preparation and delivery of his tender. The Corporation reserves the right to accept a separate tender or separate tenders for any one or more of the sections of a specification. The corporation also reserves the right to withdraw the tender at any stage.
- No tender shall be deemed to have been accepted unless or until a formal contract / letter of award is signed by both parties.
- **The Corporation reserves the right to:**
 - Not evaluate and award submissions that do not comply with this tender document.
 - Make a selection solely on the information received in the submissions
 - Enter into negotiations with any one or more of preferred bidder(s) based on the criteria specified in the evaluation of this tender.
 - Contact any bidder during the evaluation process, in order to clarify any information, without informing any other bidders. During the evaluation process, no change in the content of the RFQ shall be sought, offered or permitted.
 - Award a contract to one or more bidder(s).
 - Accept any tender in part or full at its own discretion.
 - Cancel this RFQ or any part thereof at any time.
- Should a bidder(s) be selected for further negotiations, they will be chosen on the basis of the greatest benefit to the Corporation and not necessarily on the basis of the lowest costs, aligned to the BEE & Price.

13 COST OF BIDDING

The Tenderer shall bear all costs and expenses associated with preparation and submission of its tender or RFQ, and the Corporation 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.

14 PAYMENT TERMS

SABC will effect payment sixty (60) days after the service provider has submitted an invoice.

END OF RFQ DOCUMENT

ANNEXED TO THIS DOCUMENT FOR COMPLETION AND RETURN WITH THE DOCUMENT:

- Annexure A - Declaration of Interest
- Annexure B - **SBD 6.1 Form**
- Annexure C - Consortiums, Joint Ventures and Sub-Contracting Regulations
- Annexure D - Previous completed projects/Current Projects
- Annexure E - **SBD 4 Form**

ANNEXURE A

DECLARATION OF INTEREST

1. Any legal or natural person, excluding any permanent employee of SABC, may make an offer or offers in terms of this tender invitation. In view of possible allegations of favouritism, should the resulting tender, or part thereof be awarded to-
 - (a) any person employed by the SABC in the capacity of Tenderer, consultant or service provider; or
 - (b) any person who acts on behalf of SABC; or
 - (c) any person having kinship, including a blood relationship, with a person employed by, or who acts on behalf of SABC; or
 - (d) any legal person which is in any way connected to any person contemplated in paragraph (a), (b) or (c),

it is required that:

The Tenderer or his/her authorised representative shall declare his/her position *vis-à-vis* SABC and/or take an oath declaring his/her interest, where it is known that any such relationship exists between the Tenderer and a person employed by SABC in any capacity.

Does such a relationship exist? [YES/NO]

If YES, state particulars of all such relationships (if necessary, please add additional pages containing the required information):

	[1]	[2]
NAME	:	
POSITION	:	
OFFICE WHERE EMPLOYED	:	
TELEPHONE NUMBER	:	
RELATIONSHIP	:	

2. Failure on the part of a Tenderer to fill in and/or sign this certificate may be interpreted to mean that an association as stipulated in paragraph 1, *supra*, exists.
3. In the event of a contract being awarded to a Tenderer with an association as stipulated in paragraph 1, *supra*, and it subsequently becomes known that false information was provided in response to the above question, SABC may, in addition to any other remedy it may have:
 - recover from the Tenderer all costs, losses or damages incurred or sustained by SABC as a result of the award of the contract; and/or
 - cancel the contract and claim any damages, which SABC may suffer by having to make less favourable arrangements after such cancellation.

SIGNATURE OF DECLARANT

TENDER NUMBER

DATE

POSITION OF DECLARANT

NAME OF COMPANY OR TENDERER

ANNEXURE B
SBD 6.1

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**

a) The applicable preference point system for this tender is the **80/20** preference point system.

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:

SPECIFIC GOALS	80/20
EME/SME 51% owned by Black people	10
51% owned by Black people;	5
51% owned by Black people who are women	3
Black Youth	2

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:

80/20	or	90/10
$Ps = 80 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)$	or	$Ps = 90 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)$
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:

80/20	or	90/10
$Ps = 80 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)$	or	$Ps = 90 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)$

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 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)
SMMEs (inclusive or QSEs and EMEs) 51% owned by Black people	10	
51% owned by Black people;	5	
51% owned by Black people who are women	3	
Black Youth	2	

NB: All tenders will be issued to the market with all specific goals, and these will be scored in accordance with the evidence as submitted by the bidder. The bidder who does not meet the specific goals will not be disqualified but score zero

Source Documents to be submitted with the Bid or RFQ

Specific Goals	Acceptable Evidence
B-BBEE	Valid BEE Certificate / Sworn Affidavit (in case of JV, a consolidated scorecard will be accepted)
Black Women Owned	Certified ID Documents of the Owners/shareholder
Black Youth owned	Certified ID Documents of the Owners

EME or QSE 51% Black Owned	Annual Financial/ Management Accounts/ B-BBEE Certificate / Affidavit/ Certified ID Documents of the Owners/shareholder
51% Black Owned	CIPC Documents / B-BBEE Certificate/Affidavit/ Certified ID Documents of the Owners/shareholder
South African Enterprises	CIPC Documents

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.

.....

SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME:

DATE:

ADDRESS:

.....

.....

.....

ANNEXURE C

CONSORTIUMS, JOINT VENTURES AND SUB-CONTRACTING REGULATIONS

1. CONSORTIUMS AND JOINT VENTURES

- 1.1 A trust, consortium or joint venture will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their B-BBEE status level certificate.
- 1.2 A trust, consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate tender.

2 SUB-CONTRACTING

- 2.1 A person awarded a contract may only enter into a subcontracting arrangement with the approval of the organ of state.
- 2.2 A person awarded a contract in relation to a designated sector, may not subcontract in such a manner that the local production and content of the overall value of the contract is reduced to below the stipulated minimum threshold.
- 2.3 A person awarded a contract may not subcontract more than 25% of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level of contributor than the person concerned, unless the contract is subcontracted to an EME that has the capability and ability to execute the subcontract.

3 DECLARATIONS OF SUB-CONTRACTING

- 3.1 Will any portion of the contract be sub-contracted? YES / NO
- 3.2 If yes, indicate:
 - 3.2.1 The percentage of the contract will be sub-contracted%
 - 3.2.2 The name of the sub-contractor
 - 3.2.3 The B-BBEE status level of the sub-contractor.....
 - 3.2.4 whether the sub-contractor is an EME YES / NO

SIGNATURE OF DECLARANT

TENDER NUMBER

DATE

POSITION OF DECLARANT

NAME OF COMPANY OR TENDERER

ANNEXURE “D”

Previous completed projects (preferably provide a detailed company profile, detailed the below mentioned information)

Project Descriptions	Client	Contact no	Contact person	Email address	Period of projects	Value of projects	Project Commence date	Completed date

Current projects (preferably provide a detailed company profile, detailed the below mentioned information)

Project Descriptions	Client	Contact no	Contact person	Email address	Period of projects	Value of projects	Project Commence date	Completion date

ANNEXURE E

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

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.

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

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

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.

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