

REQUEST FOR QUOTATION (RFQ) FOR THE APPOINTMENT OF A PANEL OF SUPPLIERS TO PROVIDE EXHIBITION LIGHTING HARDWARE FOR EXHIBITION PROJECTS.

Reference Number	IZIKO_R&E_RFQ_LIGHTING HARDWARE _2024/09/05
Description	To provide Exhibition Lighting Hardware/ Luminaires for exhibition projects.
Address	25 Queen Victoria Street, Cape Town, 8001
Attention	Amy Sephton, Chief Curator: Exhibition Design and Production
Site Visit	Not Applicable
Closing date and time for submission	09 October 2024 @ 11h00
Method of delivery	Quotes / Proposals, and accompanying documentation, must be emailed to (SCM) 021 481 3889: SCM (scm@iziko.org.za) and Noleen Donson (ndonson@iziko.org.za)
Technical enquiries	Amy Sephton; asephton@iziko.org.za ; 071 761 3331
Name of Company	
CSD Supplier Number (MA.....Number)	
B-BBEE Status Level of Contribution	
Quote Price (Incl Vat)	
Signature	

1. BACKGROUND

Iziko Museums of South Africa (Iziko) is a schedule 3A public entity and non-profit organisation, partly subsidised by the National Department of Sport, Arts & Culture (DSAC), bringing together 11 national museums and a Social History Centre situated in the Western Cape under a single governance and leadership structure. Iziko was established in terms of the Cultural Institutions Act, 1998 (Act No. 119 of 1998) and is required to comply with the Public Finance Management Act (PFMA), 1999 (Act No. 1 of 1999, as amended) and its concomitant Regulations. Iziko Museums deliver high-quality exhibitions across several sites.

2. SCOPE OF SERVICES

Iziko Museums of South Africa requires a **panel of up to 3 luminaires/ lighting hardware providers** for the supply of exhibition lights, from October 2024 – September 2026. This contract may be renewed. Hardware supplies will differ per project. Service providers may be selected to work on one or multiple projects, depending on availability of stock, and turnaround time of fabrication. Service providers will be required to work closely with relevant curators and exhibition teams and will be accountable to Iziko Museums Chief Curators and the Director of Research & Exhibitions.

The projects include but are not limited to:

- i) ISANG exhibition (half the gallery)
- ii) Old Town House Stairwell
- iii) Bo-Kaap 4 Room upgrade
- iv) Slave Lodge Gallant Gallery upgrade
- v) Slave Lodge Entrance Hall upgrade
- i) ISAM *Stone Bones* update
- ii) ISAM *Rock Art Gallery* upgrades
- i) ISAM *Whale Well* upgrades
- i) ISAM *Maritime* exhibition
- ii) Exhibition Maintenance across all Iziko sites

Requested services for projects include:

1. Initial Assessment and Design Input

- Work with Chief Curator EDP to inspect exhibition spaces and plans and recommend appropriate lighting.
- Work with Chief Curator EDP to develop designs/build drawings for specialised lighting ensuring they meet the exhibitions needs, comply with SABS regulations, and LOA's are obtained.

2. Luminaires/ Lighting Hardware

- Procure luminaires / Lighting hardware, including but not limited to:
 - Single Circuit 3-phase global tracks. Spots/fittings LED COB, dimmable and non-dimmable, focus control and fixed beam angles. Connectors, end caps, end feeds, shuttle universal rotary dimmers, dimmer module for 3-wire track lighting system,
 - Specialised lighting including but not limited to: BeamZ Water Wave or equivalent product, Gobo projectors, LED strip light with aluminum-extrusions. Custom luminaires, including but not limited to, bronze picture light fittings for above paintings, and small directional display cabinet luminaires.
- Coordinate delivery of materials and equipment to the site.
- Perform a final inspection to ensure all hardware complies with safety regulations and specifications.
- Facilitate and arrange final sign-off of all hardware, including LOA documents, with the Chief Curators before final payments

3. Post-purchase product Support

- Provide a handover briefing to staff, including instructions on the new lighting hardware
- Provide technical support and troubleshooting assistance via phone, email, or onsite visits as needed.
- Visit site to collect faulty lights under warranty, fix and return them.
- Offer post-purchase maintenance services for items no longer under warranty.
- Offer guidance on upgrades or retrofitting options to improve energy efficiency or comply with new standards.

3. DURATION OF CONTRACT

The contract will be for 24 months.

4. EVALUATION PROCESS & CRITERIA

Responses will be evaluated on the functional criteria, where after qualifying responses will be evaluated on the Price and Preference Points.

5. EVALUATION PROCESS

5.1 Evaluation of Quotation

The contract shall be awarded at the sole and absolute discretion of Iziko. Iziko hereby represents that it is not obliged to award this quotation to any bidder. Iziko is entitled to **retract** this quotation at any time as from the date of issue or reduce deliverables.

All quotations will be evaluated according to the criteria, weightings and threshold scores as Indicated in 5.3 below:

5.2 Evaluation Criteria

The selected service provider shall be required to indicate their capacity to deliver the services required by Iziko as per the requirements below:

Table 1: Functionality Criteria

1. Relevant Experience	Description	Weighting
Bidders must demonstrate experience in supplying lighting hardware/ luminaires to museums, aquariums, exhibitions, shopfitting, or other relevant high end display industries. This should include an indication of your maintenance and support of items under warranty. This should be demonstrated through: • Four (4) reference letters from four different clients • The reference letters must be on the client's letterhead. • The letters must be directly related to supplying lighting hardware/ luminaires to museums, aquariums, exhibitions, shopfitting, or other relevant industries and be directly related to your maintenance, and support of items under warranty. • Reference letters must not be older than 4 years.	• 4+ reference letters from relevant previous projects • 3 reference letters from relevant previous projects • 2 reference letters from relevant previous projects • 1 reference letter from a relevant previous project. • No reference letter	50 40 20 10 0
2. Team profile		
Bidders are required to provide profiles (CVs) of the proposed team members who will be directly involved in the • supply, • fabrication oversight and • post-purchase product support of lighting hardware/luminaires. Team members should have at least 5 years of experience in the supply of lighting hardware, fabrication oversight and post-purchase product support.	• 5 years or more experience with supply, fabrication oversight and support of lighting hardware • 5 years or more experience with supply, and support of lighting hardware • 5 years or more experience with the supply of lighting hardware • Less than 5 years' experience	30 20 10 0
5. Custom luminaire experience		

Bidders must demonstrate experience developing and fabricating and/or overseeing the fabrication of 3 custom luminaires (not off-the-shelf products). Bidders are required to provide a portfolio of fittings specially made for clients. This should be demonstrated through: - Portfolio indicating the number of custom luminaire fittings fabricated. - The portfolio must be on the client's letterhead. - The portfolio must include images and descriptions of products developed and fabricated.	Experience working with 3+ custom luminaires	20
	Experience with 1-2 custom luminaires	10
	Only offering off-the-shelf products.	0
Total Scoring		100

****Bidders are required to achieve a score of 70 points to be considered for the SPECIFIC GOALS and Price evaluations.**

6. MANDATORY REQUIREMENTS

Bidders must comply with all the mandatory requirements outlined below, to be able to proceed further to price and preference evaluation. Proposals will be evaluated on the **80/20 preference points scoring system**: that is, 80% of the points awarded will be based on price, as indicated in the table below; and 20% of the points awarded will be based on specific goals, allocated as indicated in the table below:

	Specific goals allocated points	Price
Total maximum points	20	80

7. PRICING

Price is an important factor as it ensures optimum value for money and should consider the full duration of the contracting period. A cost schedule detailing, inclusive of VAT, any disbursements, as well as escalations, if applicable, etc. must be provided in the table below:

The services and supplies detailed in the cost schedule are not limited to the items listed below; they may be adjusted or expanded as necessary to meet the project's requirements.

Table 2.1: Cost Schedule

No	Service Description:	Costing per service.
1.1	Call out fee , Cape Town CBD. Bo-Kaap and Gardens	
1.2	Call out fee Groot Constantia House	
1.3	Delivery fee , Cape Town CBD. Bo-Kaap and Gardens (flat-rate)	
1.4	Delivery fee Groot Constantia House (flat-rate)	
1.5	Dali Programing per hour, 25 Queen Victoria Rd, Cape Town CBD	
1.6	Call out fee , for post-purchase product support Cape Town CBD. Bo-Kaap and Gardens (flat-rate) In warranty	
1.7	Call out fee for post-purchase product support Cape Town, Groot Constantia House (flat rate) In warranty	

1.8	Call out fee , for post-purchase product support Cape Town CBD. Bo-Kaap and Gardens (flat-rate) after warranty	
1.9	Call out fee for post-purchase product support Cape Town, Groot Constantia House (flat rate) after warranty	
No	Luminaire Hardware Description All Luminaires should be accompanied by LOA certificates where relevant and be SABS compliant. This cost should be factored into your line items.	Costing per unit
	Track Lights (See Annexure A for specifications in detail)	
2.1	Single circuit 3 phase tracks (Global) 3m White and Black as requested	
2.2	Spots/fittings LED COB Compatible with above track – fitted with dimmable ballast	
2.2.1	±15° beam angle dimmable	
2.2.2	±20° beam angle dimmable	
2.2.3	±36° beam angle dimmable	
2.2.4	±43° beam angle dimmable	
2.2.5	±53° beam angle dimmable	
2.3	Spots/fittings LED COB Compatible with above track NOT dimmable	
2.3.1	±15° beam angle dimmable	
2.3.2	±20° beam angle dimmable	
2.3.3	±36° beam angle dimmable	
2.3.4	±43° beam angle dimmable	
2.3.5	±53° beam angle dimmable	
2.4	Spots/fittings LED COB, compatible with the above track. Stepless adjustable beam for beam angles ±15° to ±60°	
2.5	Spots/fittings LED, compatible with the above track. one-directional wall washer with a reflector	
2.6	Spots/fittings LED COB, compatible with the above track. Wide Flood Wall Washer ± 0.5m	
2.7	Spots/fittings LED COB, compatible with the above track. Integrated driver. Wide Flood Wall Washer ± 1m	
2.8	Connectors (Straight, T and corner)	
2.9	End caps	
2.10	End feeds	
2.11	Shuttle universal rotary dimmers	
2.12	Dimmer module for tracks above	
2.13	1m Suspension kits	
2.14	3m suspension kits	
3	LED Strip lighting (See Annexure A)	
3.1	LED Strip light- min 1500 lumens per meter. - LED life of 50,000 hours. - Colour Warm White. (Cost per M)	
3.2	Dimmable Drivers for LEDs above	

3.3	2m A13 corner profile LED Channel Aluminum with opal diffuser, mounting clip and pair of end caps.	
3.4	2m A4 slim profile LED Channel Aluminum with opal diffuser, mounting clip and pair of end caps.	
3.5	2m A6 slim profile LED Channel Aluminum with opal diffuser, mounting clip and pair of end caps.	
4	General Maintenance Lighting	
4.1	Gu10 LED warm white 3000k.	
4.2	Gu10 LED cool white 4000k.	
4.3	Gu5.3 warm white 3000k.	
4.4	Gu5.3 cool white 4000k.	
4.5	E27 warm white 3500k.	
4.6	Spot track with stem 1LT GU10 2 wire white SCL200 or equivalent	
4.7	10W LED Slim profile Flood Light with integrated driver. Hours >_ 20000 Black. GTL 440 ARF -1010 or equivalent	
4.8	Incandescent Lamp 100w E27-ES 220-240 V. Eurolux or equivalent	
4.9	Medium Bi-Pin Fluorescent 18 W G13, 4100K. 13000 hours. Phillips TL-D 18W/33-640 1SL/25 or equivalent	
4.10	Fluorescent Lamp L 30W/840 G13 Universal White Osram Lumilux or equivalent	
4.11	CFL Bulb E27	
4.12	CFL Bulb B22 (Bayonet Cap)	
4.13	PAR 38	
5	Specialised and custom luminaires/ lighting (See Annexure B for specifications in detail)	
5.1	BeamZ Water Wave or equivalent product	
5.2	Custom bronze picture luminaires for above paintings made in various lengths, cost on 3m length	
5.3	Small custom directional display cabinet lights	
5.3 A1	Type A – with focus control	
5.3 A2	Type A – NO focus control	
5.3 B1	Type B – with focus control	
5.3 B2	Type B – NO focus control	
5.3 C1	Type C – with focus control	
5.3 C2	Type C – NO focus control	
5.3 D1	Type D – with focus control	
5.3 D2	Type D – NO focus control	
5.3 E1	Type E – with focus control	
5.3 E2	Type E – NO focus control	
5.4	Case fittings with stand and LED strip light as per Annexure B	
5.4 A	Type A	
5.4 B	Type B	
5.5	Wall fittings with stand and LED strip light as per Annexure B	
5.5 A	Type A	

5.5 B	Type B	
5.6	Fixed Gobo Projectors: Use to project an adjustable beam– for specialised lighting beams, fit for museums and galleries.	
5.7	Fixed Gobo Projectors: Use to project a single pattern or image fitted with a gobo card holder , for specialised lighting beams, fit for museums and galleries.	
5.8	Rotating Gobo fixture with Gobo 'card' holder.	
5.9	Focus Projector Lenses / Gobos– Custom Glass Gobos	
5.10	Focus Projector Lenses / Gobos– Effects Glass Gobos	
5.11	Focus Projector Lenses / Gobos– high-quality aluminum alloy, custom shapes	
	Total including VAT	

Table 2.2: Quote for ISANG Project and Maintenance Needs

No	Service Description:	Quantity	Costing per service.
1.3	Delivery fee , Cape Town CBD. Bo-Kaap and Gardens (flat-rate)		
No	Luminaire Hardware Description All Luminaires should be accompanied by LOA certificates where relevant and be SABS compliant. This should be factored into each line item.	Quantity	Costing per unit
	Track Lights (See Annexure A for specifications in detail)		
2.1	Single circuit 3 phase tracks (Global) White 158m total (2x 1m – 18 x 2m – 18 x 3m – 4 x4m – 10x 5m)	158 m	
2.3	Spots/fittings LED COB Compatible with the above track NOT dimmable WHITE between $\pm 36^\circ$ - $\pm 53^\circ$ beam angle as per Annexure A	100	
2.4	Spots/fittings LED COB Compatible with the above track dimmable WHITE between $\pm 36^\circ$ - $\pm 53^\circ$ beam angle as per Annexure A	50	
2.8	Connectors corner	8	
2.9	End caps	140	
2.10	End feeds	70	
2.11	Shuttle universal rotary dimmers	12	
2.12	Dimmer module for tracks above	12	
2.14	3m suspension kits	12	
5.6	Fixed Gobo Projectors: Use to project an adjustable beam– for specialised lighting beams, fit for museums and galleries.	7	
4	General Maintenance Lighting		
4.1	Gu10 LED warm white 3000k.	100	
4.2	Gu10 LED cool white 4000k.	100	
4.3	Gu5.3 warm white 3000k.	100	
4.4	Gu5.3 cool white 4000k.	100	
4.5	E27 warm white 3500k.	100	

4.6	Spot track with stem 1LT GU10 2 wire white SCL200 or equivalent	100	
4.7	10W LED Slim profile Flood Light with integrated driver. Hours >_ 20000 Black. GTL 440 ARF -1010 or equivalent	30	
4.8	Incandescent Lamp 100w E27-ES 220-240 V. Eurolux or equivalent	50	
4.9	Medium Bi-Pin Fluorescent 18 W G13, 4100K. 13000 hours. Phillips TL-D 18W/33-640 1SL/25 or equivalent	50	
4.10	Fluorescent Lamp L 30W/840 G13 Universal White Osram Lumilux or equivalent	50	
4.11	CFL Bulb E27	50	
4.12	CFL Bulb B22 (Bayonet Cap)	50	
4.13	PAR 38	100	
	Total including VAT		

Service Providers must submit all documents as outlined in **Table 3: Compliance Documents**. SBD documents to be completed are supplied below.

Table 3: Compliance Documents

1	Central Supplier Database Report – with supplier number and company details (www.csd.gov.za) and (Compliant) Tax Status Verification Pin together with tax registration number.
2	Detailed pricing structure: A cost schedule detailing full cost breakdown, inclusive of VAT, any disbursement, and escalations, if applicable, etc. for the entire duration of the proposed contract must be provided. A separate quote can accompany this as an additional document.
3	A Valid B-BBEE Certificate or Sworn Affidavit to determine the Service provider's status level.
4	SBD 6.1 - Preference points claim form
5	SBD 4 – Bidders disclosure.
6	All items required for table 1 – Functionality scoring, including, reference letters, team profile and portfolio.
7	Spec sheets to confirm you have met requirements outlined in annexures and costing schedule.
8	On delivery, all Luminaires should be accompanied by LOA certificates where relevant

Note: Failure to supply any of the compliance documents stipulated may lead to the quote not being considered.

8. PREFERENCE POINTS CLAIM

SBD 6.1 Preference Points Claim form in terms of the Preferential Procurement Regulations of 2022. The points are allocated as follows:

Table 4: Preference Point System

Description		Points Allocated
1.	Price	80 Points
2.	Specific Goals	20 Points

9. FORMAL CONTRACT

- a) The proposal and appended documentation read together form the basis for an agreement to be negotiated and concluded in a formal contract between Iziko and the preferred Service Provider.
- b) A mere offer and acceptance shall not constitute a formal contract of any nature for any purpose between Iziko and the preferred Service Provider/s.

10. GENERAL PRINCIPLES

- a) The lowest or only quotation received will not necessarily be accepted.
- b) Iziko and its Council reserves the right to accept or reject any quotation in response to the Request to Quote and to withdraw its decision to seek the provision of these services at any time.

10.1 Consent

The Bidder, by signing this document, hereby consents to the use of their personal information described herein and confirms that:

- they have obtained all the necessary consent from their shareholders/directors or counterparts, including the consent for Iziko to receive and process such personal information.
- Failure to provide the information will result in the objectives of the RFQ not being achieved, with the Bidder being disqualified.
- The Bidder voluntarily submits this bid/document containing personal information, for the purposes of the RFQ.

Iziko is committed to protecting the Bidder's privacy and recognises that it needs to comply with statutory requirements in collecting, processing, and distributing personal information. The Constitution of the Republic of South Africa provides that everyone has the right to privacy and the Protection of Personal Information Act 4 of 2013 ("POPI") includes the right to protection against unlawful collection, retention, dissemination, and use of personal information. In terms of section 18 of POPI, if personal information is collected Iziko, as responsible party, must take reasonably practical steps to ensure that the data subject is made aware of the information being collected.

10.2 Declaration

The undersigned, who warrants that they / he / she is duly authorized to do so on behalf of the enterprise:

- i) confirms that neither the name of the enterprise or the name of any partner, manager, director or other person, who wholly or partly exercises, or may exercise, control over the enterprise appears on the Register of Tender Defaulters established in terms of the Prevention and Combating of Corrupt Activities Act of 2004;
- ii) confirms that no partner, member, director or other person, who wholly or partly exercises, or may exercise, control over the enterprise appears, has within the last five years been convicted of fraud or corruption;
- iii) confirms that I / we are not associated, linked or involved with any other tendering entities submitting tender offers and have no other relationship with any of the tenderers or those responsible for compiling the scope of work that could cause or be interpreted as a conflict of interest and;
- iv) confirms that the contents of this questionnaire/forms (SBD 4, & 6.1) are within my personal knowledge and are to the best of my belief both true and correct
- v) accept that, in addition to cancellation of a contract, action may be taken against me should the Declaration prove to be false.
- i) In terms of Preferential Procurement Regulation 11 and section 2(1) (f) of the Preferential Procurement Policy Framework Act, the IZIKO may consider the following objective criteria in the bid award:
 - ii) The risk of fruitless and wasteful expenditure to the IZIKO.
 - iii) The risk of an abnormally low bid.
 - iv) The risk of a material irregularity.
- v) The IZIKO reserve the right not to consider bids from Bidders who are currently in litigation with the IZIKO; and
- vi) The IZIKO further reserve 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 IZIKO and the referee submitted by the Bidder.

Signed

Date

Name

Position

Enterprise
name

Please note that if the supporting documentation is not provided then the submission will be classified as non-responsive.

1. Disqualification

Please note that if a bid document is not filled in correctly or completely, or complied with the specification, or is delivered/send after the bid closing date and time, or the supplier is not registered on the CSD or supplier has a non-compliant tax status, then unfortunately that bidder maybe disqualified. Please return this document with the supporting documents.

2. Bid Document Submission

Emailed tender documents will be accepted. However, the onus is on the tenderer to ensure that complete email documents have been received by the IZIKO by the due date and time.

Please note that any alterations to the tender document other than filling in the tenderer's details and tender price will automatically disqualify the tenderer.

BIDDER'S DISCLOSURE (SBD 4)

1. PURPOSE OF THE FORM (SBD 4)

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

(please select or underline applicable position highlighted in bold).

- 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. (please select or underline applicable position highlighted in bold).

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**

(please select or underline the applicable position highlighted in bold).

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

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.

any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.

- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.
- I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....

Signature

Date

.....

Position

.....

Name of bidder (Company Name)

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

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:

	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:

$$Ps = 80 \left(1 - \frac{Pt - Pmin}{Pmin} \right) \text{ or } Ps = 90 \left(1 - \frac{Pt - Pmin}{Pmin} \right)$$

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:

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

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 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	Evidence	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)
Persons, or categories of persons, historically disadvantaged- (HDI) by unfair discrimination on the basis of	• Proof of B-BBEE certificate; • Company Registration Certification • Identification Documentation. • CSD report		
Race: black persons (ownership)* 50% or more black ownership = 20 points Less than 50% black ownership = 10 points 0% black ownership = 0 points			

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:

- vii) The information furnished is true and correct;
- viii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- ix) 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;
- x) 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)

NAME OF ORGANISATION:

SURNAME AND NAME:

DATE:

ADDRESS:

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