

REQUEST FOR QUOTATION (RFQ) REQUEST TO QUOTE

APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE ACCOUNTING SERVICES AND SUPPORT TO THE CFO FOR A PERIOD OF SIX (6) MONTHS

Reference Number	RTQ/AS/03/2025
Description	SERVICE PROVIDER TO PROVIDE ACCOUNTING SERVICES AND SUPPORT TO THE CFO FOR A PERIOD OF SIX (6) MONTHS
Address	Iziko South African Museum, 25 Queen Victoria Street, Cape Town, 8001
Attention	Noleen Donson
Site Visit	No
Issue date	7 March 2025
Closing date and time for submission	Tuesday 18 March 2025 at 11h00
Method of delivery	Quotes / Proposals, and accompanying documentation, must be emailed to (SCM) 021 481 3917: ndonson@iziko.org.za and scm@iziko.org.za
Technical enquiries	Please contact CFO, Ronell Pedro: Telephone 021 481 3825 (office hours) Email: rpedro@iziko.org.za
Name of Bidding Company	
CSD Supplier Number (MA.....Number)	
B-BBEE Status Level of Contribution	
Quoted Price (Incl Vat)	
Signature	

APPOINTMENT OF EXPERIENCED SERVICE PROVIDERS SERVICE PROVIDER TO PROVIDE ACCOUNTING SERVICES AND SUPPORT TO THE CFO FOR A PERIOD OF SIX (6) MONTHS**1. Purpose**

The purpose of this request is to invite suitably qualified service providers to provide accounting services and support to the CFO. The service provider will be appointed for a period of six (6) months, effective from 1 April 2025 (or soon thereafter) to September 2025, in preparation for and during the 2024/25 financial year audit.

2. Background

Iziko Museums of South Africa (Iziko) is a schedule 3A public entity and non-profit organisation, subsidised by the National Department of Sport, Arts & Culture (DSAC), bringing together 12 national museums of 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 complies with the Public Finance Management Act, 1999 (Act 1 of 1999) (PFMA) and its concomitant Regulations. The CFO will be available throughout the duration of the project, but the support provided is intended to assist with the CFO's intensive workload, particularly in the lead-up to and during the audit.

3. Project Scope

Proposals are hereby invited for the supply of accounting services and offer support to the CFO at Iziko Museums. Iziko seeks to appoint a service provider to provide resources at a level of a Senior Finance Manager with expertise in financial reporting, management accounting and supply chain management. The goal is to support the CFO and provide additional capacity to the Finance and Administration department at Iziko Museums.

The preferred service provider will have experience and knowledge of the Public Finance Management Act (Act No. 1 of 1999) and Treasury Regulations related to public entities. Practical experience in audits, particularly in public entities of Iziko's size and nature, is strongly preferred.

The service provider will use their expertise and make resources available to assist Iziko with the required tasks to support the Finance and Administration department in preparation for the 2024/25 year-end audit. This includes the preparation of annual financial statements and ongoing support throughout the audit process until its completion.

4. Requirements

The scope of work expected from the appointed service provider shall include, but is not limited to, the following key tasks:

- Prepare GRAP compliant annual financial statements for the 2024/25 financial year using CaseWare, including prior year financial information (non-negotiable)
- Assist with the preparation of GRAP compliant Annual Financial Statements and supporting schedules for the audit file for the 2024/25 financial period audit
- Assist in managing the organisation-wide asset verification project (excluding Heritage Assets), overseeing the appointed service provider, and ensuring the entire process is managed efficiently. This includes preparing an asset write-off list and updating the fixed asset register in readiness for audit.
- Oversee audit readiness, including assisting with Payroll and GL, Visitor Statistics and Income reconciliation processes.
- Ensure that all necessary registers for audit (Quotation and Tender Registers, Contract, Irregular Expenditure, and Deviations Registers) are updated and complete.
- Provide support during the audit by the Auditor-General of South Africa (AGSA), including responding to requests for information (RFIs) and submitting necessary audit documents.
- Assist with responses to audit queries and findings.

- Support quarterly reporting as required.
- Assist with the BEEE verification audit for Iziko, meeting with the service provider and providing the necessary information.
- Support internal audit engagements, where applicable.

5. Consortiums/Joint ventures

Service providers may form consortiums or joint ventures to submit a proposal, combining multiple disciplines and expertise. Each member of the consortium/joint venture must comply with the requirements of this request. It is recommended that consortia consider partnering with smaller but capable organisations, allowing for mutual development and strengthening the proposal. If a consortium/joint venture is selected, the contract will be signed with the lead organisation, which must be clearly identified in the proposal.

6. Service Provider Requirements and Competencies

The service provider is expected to possess the following competencies:

- a) Proven experience and knowledge with Accounting, Asset Management, Supply Chain Management as well as audits in the public service as conducted by the AGSA
- b) Capacity to execute and complete all tasks at various levels successfully
- c) Requisite expertise to execute and complete all tasks at various levels successfully

7. Period of Performance and key dates

The service provider should have the capacity to assist as soon after appointment as is possible to assist with the audit planning and preparations which are already underway.

- The first draft of the Annual Financial Statements should be available for internal audit review by 15 April 2025.
- The service provide should be able to assist with quarterly reports which are due early in April 2025.
- The service provider should have the capacity to manage the PPE verification process in its entirety and ensure that corrections are effected in the Fixed asset register by 31 May 2025.
- The service provider will be required to assist with ensuring that the reconciliations are done
- The service provider will be required to ensure that the SCM registers are updated and ready to be audited before 31 May 2025
- The service provider should be available to assist during the audit execution period from 1 June to 31 July 2025.
- The service provider will be required to assist with responses to audit findings and requests for information which require a 5-day and 2-day response time.
- The service provider will be required to assist with the BEEE audit during and after the audit execution period
- The service provider will be required to assist with ensuring that information required of the Annual Report is available and submitted before printing. This includes checking for consistency with the Annual Financial Statements

8. Bidding Stages

The Service Provider must comply with Iziko's Supply Chain Management policies and procedures by submitting the required documents.

The bidding requirements and stages are summarised in the table below:

Table 1: Bidding requirements and stages

Stage 1- Administrative Documents Bidders must submit all documents as outlined in Table 2: Administrative Returnable Documents . Note: Failure to supply any of the administrative documents stipulated below <u>may lead to disqualification</u> Bidders will be given three (3) working days and one opportunity in which to submit any missing or incomplete administrative documents	Stage 2 - Functionality Criteria Bidders are required to achieve a minimum of 70% on functionality criteria to proceed to the next stage Refer Table 3 – Required documents to enable functionality scoring. Note: Failure to supply any of the administrative documents stipulated below <u>may lead to disqualification</u> Bidders will be given three (3) working days and one opportunity in which to submit any missing or incomplete documents	Stage 3 - Price and Specific Goals Bidders that meet the minimum threshold for functionality will be evaluated based on Price & Preferential Procurement Specific Goals Evaluation Criteria as indicated in Table 4 : Price – 80 points Specific Goals– 20 points
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Table 2: Administrative Returnable Documents

If any of the required documents are not included in the bid, bidders will be requested in writing to submit the documents within three (3) working days and failure to do so by the third working day, will result in the relevant bid being rejected.

Order	Documents required
1.	Central Supplier Database Report – with supplier number and company details (www.csd.gov.za) and Tax Status Verification Pin together with tax registration number
2.	Completed SBD 1 - Invitation to Bid
3.	Completed SBD 3.3 - Pricing Schedule 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
4.	Completed SBD 4 – Bidder's Disclosure
5.	Completed SBD 6.1 - Preference Points Claim Form (Preferential Procurement Regulations 2022)

Table 3: Documentation for Functionality Scoring

If any of the required documents are not included in the bid, bidders will be requested in writing to submit the documents within three (3) working days and failure to do so by the third working day, will result in the relevant bid -being rejected.

No.	In order to score the bid for functionality, the proposal should include the following:
1	Reference (s) letters not older than 5 years from previous clients demonstrating years of experience in executing projects of a similar nature.
2	The CVs and qualifications of key members of the project team to indicate desired level of experience, specifically in Caseware
3	Execution plan covering specific points listed
4	A project team organogram with a resource allocation plan

Preference Points Claim

In terms of Regulation 4 of the Preferential Regulations pertaining to the Preferential Procurement Policy Framework Act 2000 (Act 5 of 2000) Preferential Procurement Regulations, 2022 responsive bids will be adjudicated by the state on the 80/20 preference point for Specific goals in terms of which points are awarded to the bidders on the basis of price and specific goals, as follows:

Table 5: Price and Specific Goals

Preference Point Criteria	Points Allocation
Price	80
Specific Goals A Valid B-BBEE certificate or Sworn Affidavit; Company Registration Certification Identification Documentation of shareholders. Latest CSD report Ownership by HDIs (Who had no franchise on national elections before the 1983 and 1993 constitution) 50% or more black ownership = 20 points Less than 50% black ownership = 10 points 0% black ownership = 0 points	20
TOTAL POINTS	100

9. Functionality

Proposals must score an overall minimum of 70% (70 points) for functionality criteria to qualify for further evaluation for preference points.

Functionality Criteria	Points Allocation	Value
1. Experience in Similar Projects	25	
2. Skills and Competency of Personnel	25	
3. Technical Approach and Execution Plan	25	
4. Capacity	25	
Sub Total	100	
Minimum Stipulated Threshold to be met	70 points (70%)	

DETAILED FUNCTIONALITY EVALUATION CRITERIA

NO.	CRITERION	DESCRIPTION	SCORE	
1.	Service Provider Experience in similar projects Provide supporting reference letter(s) not older than 5 years from previous clients demonstrating years	Reference (s) letters for work performed in the past 5 years. The reference letters: 1. must be signed by the referee and 2. contain the value; exact nature of work performed, as well as the		

	of experience in executing projects of a similar nature. Company Profile: A brief company profile outlining the provider's history and experience in the public sector, especially those involving public sector accounting, audits, and compliance with PFMA.	duration of the project, preferably in tabular form as follows: <table><tr><td>Client Name</td><td>Period</td><td>Value</td><td>Project Description</td></tr></table> Iziko reserves the right to verify the validity of the references.	Client Name	Period	Value	Project Description		
Client Name	Period	Value	Project Description					
		No references letters/unsigned reference letters/reference letters do not contain details of projects, values and duration as stated above or does not demonstrate experience with AGSA audit processes.	0					
		3 reference letters for similar work done within the past 5 years	10					
		4 reference letters for similar work done within the past 5 years	15					
		5 or more reference letters for similar work done within the past 5 years (Max 25)	25					
2.	Skills and Competency of Personnel Submit the; CVs and qualifications of key members of the project team to indicate desired level of experience, specifically in Caseware and knowledge of accounting and specifically asset management to successfully complete the project	Provide: 1. The CV of at least one key member indicating their experience in similar projects as it aligns with specific tasks in the scope of work. 2. Relevant qualifications (e.g., CA(SA), CIMA, or other certifications of key team member(s) listed above (Max 25)						
		CV('s) of key team member(s) not provided and/or the CV('s) indicate less than one year's experience and/or Qualifications of listed key team member(s) not provided or not relevant	0					
		The CV('s) of key team member(s) indicate 1 to 2 years' experience in similar projects and key team member(s) have the required qualifications	10					
		The CV('s) of key team member (s) indicate 3 to 5 years' experience in similar projects and key team member(s) have a -required qualification	15					
		The CV('s) of key team member(s) indicate more than 5 years' experience in similar projects and key	25					

		team members(s) have the required qualifications		
3	Technical Approach and Execution Plan Provide a comprehensive methodology demonstrating an understanding of the project requirements, timelines, and deliverables, and establishes clear communication lines with Iziko.	Comprehensive Execution plan to cover at least the following points: 1. Summary: A concise summary indicating how the bidder plans to manage the project and cover audit preparation, asset verification, quarterly reporting, and the audit process itself. 2. Timelines: A timeline that includes key milestone 3. Personnel: The number of personnel to be deployed and their availability. 4. Quality Control: An indication of which quality control checks will be done to ensure accuracy and completeness 5. Communication: A clear indication of how issues and updates will be handled throughout the project, including designated points of contact, and reporting frequency 6. Appropriate support: An indication of appropriate support (adequate and cost-effective) that will be given (Max 25)		
		No Execution plan is provided, or the plan is generic, unclear and vague	0	
		4 or fewer of the above points are covered adequately	10	
		5 of the above points are covered adequately	15	
		All 6 of the above points covered with a detailed and comprehensive approach covering all key aspects	25	
4.	Capacity Ability to allocate sufficient resources and maintain capacity throughout the project to meet deadlines	The service provider should have the ability to allocate sufficient resources and maintain capacity throughout the project to meet deadlines. A project team organogram with a resource allocation plan that demonstrates how resources will be distributed across the project to ensure completion within the stipulated timeline.		

		(Max 25)		
		No organogram and/or organogram is generic and not project specific and/or no Capacity Plan and/or the plan does not reflect sufficient capacity to complete the project.	0	
		Organogram is not clear on roles and the Resource Allocation and Staffing Plan is basic but does reflect sufficient capacity to complete the project.	10	
		Project specific organogram provided, and the Capacity and Resource Plan is comprehensive with adequate staff allocation. Plan includes details on who will be allocated each task with sufficient quality controls in place.	25	
Total Points			100	
Minimum Stipulated Threshold to be met			70 points (70%)	

Note: Only proposals meeting the Minimum Stipulated Threshold of 70% of the Functionality Evaluation will be considered for further evaluation for 80/20 Preference Points.

10. Pricing

Price is an important factor as it ensures optimum value for money and Total Cost to Iziko and should take into account the full duration of the contracting period.

1. A detailed pricing structure indicating a flat rate for services or hourly rates must be submitted.
2. Pricing must indicate the rates per type of service.
3. All quoted prices accepted will remain fixed and firm from date of acceptance until the end of the contract period.
4. The pricing structure must be inclusive of VAT.
5. Any disbursements must be indicated separately.

DESCRIPTION	UNIT PRICE	VAT	AMOUNT (Incl VAT)
Prepare GRAP compliant annual financial statements for the 2024/25 financial year (including comparatives) using CaseWare			
Assist with the preparation of GRAP compliant Annual Financial Statements and supporting schedules			
Assist in managing the organisation-wide asset verification project, overseeing the appointed service provider			
Assisting with Payroll and GL, Visitor Statistics, and Income reconciliation processes.			
Ensure updated and complete all necessary registers for audit (Quotation and Tender Registers, Contract, Irregular Expenditure, and Deviations Registers)			
Provide support during the audit by AGSA, assist with requests for information (RFIs)			

Assist with responses to audit queries and findings.			
Support quarterly reporting as required.			
Assist with the BEEE verification audit			
Support internal audit engagements			
TOTAL AMOUNT (INCLUDING VAT)			

Payment will only be made on the basis of work completed satisfactorily, and invoices provided and approved by the project manager.

11. Presentations

Iziko reserves the right to invite short listed service providers to present their proposals for final decision.

12. Validity Period

Offer to be valid for 90 working days from the bid closing date.

13. Formal Contract

- 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.
- A mere offer and acceptance shall not constitute a formal contract of any nature for any purpose between Iziko and the preferred Service Provider.

14. Reasons for disqualification

Iziko reserves the right to disqualify any submission in the event of any one or more of the following:

- The Bidder did not attend the compulsory briefing session and site visit
- The Bidder submitted their proposal late;
- The Bidder did not submit proof of CSD registration
- The Bidder did not submit complete documentation or fails to provide the documentation /information within the requested timeframes
- The Bidder submits information that is fraudulent, factually untrue or inaccurate;
- The Bid did not meet the required minimum stipulated threshold points

15. SUMMARY OF GENERAL PRINCIPLES

- Iziko will apply the 80/20 preferential points system.
- Iziko applies the provisions of the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000) and the Public Finance Management Act, 1999 (Act No. 1 of 1999).
- The lowest or only proposal received will not necessarily be accepted.
- Iziko reserves the right to withdraw its decision to seek the provision of these services at any time.
- Iziko reserves the right to appoint consultants to assist with technical and risk assessments of bids.
- Iziko reserves the right to obtain clarification from a bidder on any matter that could give rise to ambiguity in a contract arising from the bid proposal
- Iziko reserves the right to request and accept changes to a proposal from a successful bidder at any time, as long as it complies with legal and administrative requirements

- Iziko reserves the right to request the administrative returnable documents after the closing date and time in instances where the Bidder has not returned the documents. However, Iziko is under no obligation to request such documents or information and may elect to disqualify the Bidder that has not returned the requisite document.
- There will be no discussions with any bidder until a final decision has been taken by the Bid Adjudication Committee. Any subsequent discussions shall be at the discretion of Iziko.

16. Delivery Approach

The successful applicant shall, on signing the agreement, commence with business on a date agreed to by both parties.

The contract is for a six-month period as from the date of commencement.

17. Submissions

Closing date and time: Tuesday 18 March 2025 at 11h00

Interested Bidders are expected to submit returnable documents on the original Request to Quote document issued by Iziko and completed in black ink.

The submission should be in the form of an electronic version of all documentation in the proposal.

Facsimiles, and late bids will not be accepted.

It is important to note that all bids lodged will be examined to determine compliance with the bidding requirements and conditions. Bids with obvious deviation from the requirements, will be eliminated.

WRITTEN OR TELEPHONIC QUERIES MUST BE DIRECTED TO:

Ronell Pedro

Chief Financial Officer

Iziko Museums of South Africa

Switchboard: +27 21 481 3800

Direct Line; +27 21 468 3807

E-Mail: rpedro@iziko.org.za



Signature: _____

Ms. Ronell Pedro

Chief Financial Officer

BIDDER'S DISCLOSURE**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**

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 institution	State

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

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.

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 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.

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.

.....
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:

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 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		
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:

- 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:

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1. DECLARATION

The undersigned, who warrants that 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.

Signed

Date

Name

Position

Enterprise name