SECTION 9: Specific Goals Points Claim Form

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

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1. **GENERAL CONDITIONS**

1.1. The following preference point systems are applicable to invitations to tender:

1.1.1. the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and

1.1.2. 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

In terms of Regulation 3(2) of the Preferential Procurement Regulations, either the 80/20 or 90/10 preference point system will apply. The highest acceptable tender will be used to determine the applicable preference point system.

1.3. Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

1.3.1. Price; and

1.3.2. 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 or 90 See note below
SPECIFIC GOALS	20 or 10 See note below

Total points for Price and SPECIFIC GOALS	100

Note: *Either the 80/20 or 90/10 preference point system will apply. The highest acceptable tender will be used to determine the applicable preference point system*

1.5. Failure by the Bidder to submit the prescribed documentary evidence in support of any specific goal claimed, as set out in Clause 4.4 and Annexure J, shall result in no preference points being awarded for that specific goal.

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

2.1. **"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;

2.2. **"price"** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;

2.3. **"rand value"** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

2.4. **"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

2.5. **"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 (Not applicable to this RFP)

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

$$Ps = 80\left(1 - \frac{Pt - P\,min}{P\,min}\right)$$ *OR* **90/10** $$Ps = 90\left(1 - \frac{Pt - P\,min}{P\,min}\right)$$

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 (Applicable to this RFP)**

3.2.1. **POINTS AWARDED FOR PRICE**

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

80/20

$$Ps = 80\left(1 + \frac{Pt - P\,max}{P\,max}\right)$$ *OR* **90/10** $$Ps = 90\left(1 + \frac{Pt - P\,max}{Pmax}\right)$$

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 the Preferential Procurement Regulations, 2022, preference points shall be awarded for specific goals stated in this Request for Proposal.

4.2. Preference points will only be awarded where the Bidder submits the prescribed documentary evidence in support of each specific goal claimed. Failure to submit the required documentary evidence together with the Proposal shall result in no preference points being awarded for that specific goal.

4.3. The specific goals applicable to this Request for Proposal, together with the maximum points available under the applicable preference point system, are set out below.

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

*(**Note to organs of state**: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.*

***Note to tenderers**: The tenderer must indicate how they claim points for each preference point system.*)

The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
B-BBEE Status Level of Contributor	2.5	5		
Job Creation and Labour Intensification	2.5	5		
Black Women Ownership	2.5	5		
Local Enterprise Participation	2.5	5		
Total	**10**	**20**		

4.4. **Documentary Evidence Required**

The Bidder shall submit the following documentary evidence in support of the specific goals claimed:

Specific Soal	Documentary Evidence Required
B-BBEE Status Level of Contributor	A valid B-BBEE Certificate or Sworn Affidavit submitted together with the Proposal.
Job Creation and Labour Intensification	Completed Annexure J indicating the number of permanent Full-Time Equivalent (FTE) jobs to be created within South Africa during the first five (5) years of the lease.
Black Women Ownership	A valid B-BBEE Certificate or Sworn Affidavit reflecting the percentage of Black Women ownership together with any supporting ownership information where required.

Local Enterprise Participation	Completed Annexure J indicating the projected expenditure on enterprises located within the province, region or municipal area where the leased premises are situated, expressed as a percentage of Annual Gross Revenue.

4.5. **Scoring Criteria**

Preference points shall be allocated as follows:

4.5.1. **B-BBEE Status Level of Contributor**

Supported by a valid B-BBEE Certificate or Sworn Affidavit submitted with the Proposal.

Level	**80/20**	**90/10**
Level 1 and Level 2	5	2.5
Level 3-8 and non-compliant	0	0

4.5.2. **Job Creation and Labour Intensification**

Number of permanent Full-Time Equivalent (FTE) jobs to be created within South Africa during the first five (5) years of the lease.

Permanent FTE Jobs	**80/20**	**90/10**
21 or more	5	2.5
11-20	4	2
6-10	3	1.5
1-5	2	1
0	0	0

4.5.3. **Black Women Ownership**

Verified percentage of ownership held by Black Women.

Ownership	**80/20**	**90/10**
≥ 30%	5	2.5

≥ 25%	4	2
≥ 20%	3	1.5
≥ 15%	2	1
≥ 10%	1	0.5
< 10%	0	0

4.5.4. **Local Enterprise Participation**

Projected expenditure on enterprises located within the province, region or municipal area where the leased premises are situated, expressed as a percentage of Annual Gross Revenue.

Projected Spend	**80/20**	**90/10**
The highest offer will receive the maximum points allocated to each of these segments. All other bidders with lower offers will proportionally receive points.	5	2.5
	4	2
	3	1.5
	2	1
	0	0

5. DECLARATION WITH REGARD TO COMPANY/FIRM

Name of company/firm……

Company registration number: ……

TYPE OF COMPANY/ FIRM

- ☐ Partnership
- ☐ Incorporated Joint Venture
- ☐ Unincorporated 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]