SUBJECT:	**KZN GROWTH FUND AGENCY (KZNGFA) REQUEST FOR QUOTATION (RFQ)**
FROM:	**COMPANY SECRETARY**
RFQ REFERENCE NUMBER:	**KZNGFA RFQ 2026 – 17**
REQUESTED SERVICES:	**KZN GROWTH FUND AGENCY BOARD EVALUATION**
CLOSING DATE:	**20 NOVEMBER 2026**
TIME:	**12H00**
SUBMISSION FORMAT:	**EMAIL scm@kzngf.co.za**

Name of the respondent: ……

NOTE: LATE BIDS WILL NOT BE ACCEPTED

BID DETAILS

BID TITLE:	KZN GROWTH FUND AGENCY BOARD EVALUATION
PROCUREMENT REFERENCE NUMBER:	KZNGFA RFQ 2026 - 17
DESCRIPTION OF GOODS & SERVICES:	APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT KZNGFA BOARD EVALUATION
DATE OF RFQ:	**09 November 2026**
DATE OF RFQ CLOSING:	**20 November 2026**
CONTACT INFORMATION:	Any enquiries regarding the bidding procedure may be directed to

Procurement Officer: Sijabulile Ntshangase

Telephone: 031 372 3720

E-mail: scm@kzngf.co.za

BIDDER'S DETAILS

NAME OF BIDDER .....

POSTAL ADDRESS .....

STREET ADDRESS .....

CONTACT PERSON .....

TELEPHONE NUMBER Code ..... Number .....

CELL PHONE NUMBER Code ..... Number .....

FACSIMILE NUMBER Code ..... Number .....

E-MAIL ADDRESS .....

Signature of Bidder ..... **Date** .....

1. PURPOSE

The KZNGFA seeks to appoint a suitable service provider to evaluate the effectiveness of the Board members and its committees in executing their duties, in line with the Principles of the King V Report, which recommends that the governing body should ensure that the evaluation of its own performance and that of its committees, its chair and its individual members, supports continued improvement in its performance and effectiveness.

2. BACKGROUND

The KwaZulu-Natal Growth Fund Agency (KZNGFA) is established as a Provincial Public Entity in terms of section 3(1) of the KZNGFA Act. The strategic objective of the KZNGFA is to provide support for creating an enabling environment for activities that create jobs and accelerate the economic development of KZN whilst promoting Broad-Based Black Economic Empowerment (B-BBEE).

2.1 Procurement Philosophy

It is the policy of the KZNGFA when purchasing goods and obtaining services to follow a course of optimum value and efficiency by adopting best purchasing practices in supply chain management, ensuring that open and fair competition has prevailed, with due regard being given to the importance of:

2.1.1 The promotion, development, and support of businesses from disadvantaged communities (small, medium, and micro-enterprises, as well as established businesses within those communities) in terms of its BEE Policy,

2.1.2 The promotion of national and regional local service providers and agents before considering overseas service providers, and

2.1.3 The development, promotion, and support for the moral values that underpin the above, in terms of KZNGFA Business Ethics and Guidelines which require that all commercial conduct be based on ethical and moral values and sound business practice. This value system governs all commercial behaviour within KZNGFA.

The KZNGFA wishes to engage with service providers equally committed to maintaining high-quality services and better pricing.

3. SCOPE OF SERVICES REQUIRED

The service provider is required to conduct an assessment of the Board and its sub-committees' performance. The scope of work shall comprise the assessment of the Board and Committees against accepted good corporate governance principles and practices. The assessment should cover:

3.1 Board and Board Committees' Composition and Skills Matrix,
3.2 Assess the balance of skills, knowledge and experience on the Board and its Committees,
3.3 Assess the effectiveness of the Board (Board and Board Committees in terms of meeting governance and matters deliberated thereon,
3.4 Board and Board Committees Overall Effectiveness and Accountability,
3.5 Evaluate the level of understanding of the Board Members of the business and strategy,
3.6 Evaluate the independence and ethics of the non–executive Board Members,
3.7 Evaluate the Board and Committees of the Board's level of confidentiality, declaration of interest, and ethics governance,
3.8 Evaluate the relationship of the Board with the Management, Committees and Executive Authority Relations with Stakeholders, and
3.9 Assess the performance of the Board Chairperson, Committee Chairpersons, the Acting CEO and the Company Secretary.

4. REQUIREMENTS

4.1 The service provider must facilitate and evaluate the Seven (7) Board members, (1) one Acting CEO, and (3) three shareholder representatives, (1) one Corporate Secretariat, totalling (12) twelve people to be evaluated,
4.2 The service provider will review existing governance and Board documentation to establish the role and expectations of the Board,
4.3 The service provider will also engage with Board Members to establish their views on several governance processes and Board dynamics,
4.4 The objectives are to ensure that KZNGFA governance procedures follow best practices, to ascertain whether the Board feels properly informed, engaged, and satisfied with its team dynamics, and to make recommendations that might enhance the Board's effectiveness,
4.5 The service provider will present a written report on the overall fitness-for-purpose of the Board, with recommendations to enhance its efficacy and structure where applicable, and
4.6 The service provider will work closely with the KZNGFA Company Secretary who will make introductions where necessary and provide requisite documentation and support for the Services.

5. PROPOSED WORK SCHEDULE

The Provider will include the following in a proposed work schedule:

5.1 Project inception,
5.2 Develop a detailed proposed methodology and a work implementation plan,
5.3 Review of Existing Documents and Records,
5.4 Consultative Meetings,
5.5 The service provider will be required to hold a consultative meeting (virtual) with the Chairperson of the Board and the Board Secretary to:
  5.5.1 Discuss engagement procedures (define the role of the Board and that of the Provider),
  5.5.2 Agree on the project methodology and project plan detailing activities to be undertaken toward the Board and its committees' evaluation,

5.5.3 Define the Board and KZNGFA roles in the evaluation process,

5.5.4 Collection of primary data and data analysis and Interpretation, which shall involve extraction of meaningful information from raw data.

6. CONTRACT DURATION

The service provider is required to complete and submit the evaluation report to the KZN Growth Fund Agency by **28 February 2027**.

7. REPORTING REQUIREMENTS

The appointed service provider shall report to the Company Secretary, being the project manager.

8. FEES / TARIFF

The KZNGFA shall pay the successful service provider for the professional services rendered in accordance with the rates agreed upon between the parties.

9. AWARD OF THE RFQ

KZNGFA is not obliged to accept and award this RFQ to the lowest bidder or any other bidder.

10. EVALUATION PROCESS AND CRITERIA

Selection will be conducted over three stages as detailed below:

Stage 1 - Compliance with Minimum Requirements,

Stage 2 – Functionality Evaluation, and

Stage 3 – Price and Specific Goals.

10.1 STAGE 1 – COMPLIANCE WITH MANDATORY REQUIREMENTS

All proposals must be completed and accompanied by:

10.1.1 SBD 1, SBD 4 and SBD 6.1,

10.1.2 Company Profile, indicating Company history and ownership, nature of business, experience details, resource plan/capacity.

10.1.3 Evidence of Registration on the National Treasury Central Supplier Database

All bids duly lodged as specified in this RFQ will be evaluated to determine compliance with the mandatory requirements and conditions. Failure to provide any mandatory information as requested above will result in the submission being deemed non-responsive.

10.2 STAGE 2 - FUNCTIONALITY EVALUATION

Functionality shall be scored out of 100%. All service providers that scored less than 70% shall be excluded from being evaluated for the price and specific goals.

The allocation of points for the evaluation of quality/functionality is set out in Table 1 below:

FUNCTIONAL EVALUATION CRITERIA	Weight
Project Plan/Methodology The service provider must provide a project plan/project methodology detailing how the bidder will evaluate the Board from inception to finalisation and reporting (execution of the project services will be carried out. Furthermore, submit a project implementation plan outlining envisaged timelines of execution of the project (details of how the different pieces of work will be implemented, in an integrated and seamless manner) ➢ Not all elements are covered in the bidder's proposal and not compliant with all requirements of the scope of works **= 5 Points.** ➢ Acceptable project plan, project timeframes and order of project activities, and indication of an execution/implementation plan **= 15 Points**. ➢ Extraordinary, more than satisfactory detailed proposal indicating how the board will be evaluated, project plan, project timeframes and order of project activities, and an indication of an execution/implementation plan. All elements were exceptionally covered in the bidder's proposal and more than complied with all requirements of the scope of works **= 30 Points**	**30**
Company Experience The company must have a minimum of 5 and a maximum of 15 years of experience in executing a project of a similar nature. The service provider must demonstrate that they have the capacity to render the required service. The service provider must provide five (5) references within the public sector confirming that the Bidder has the capacity to deliver at any given time. **Any reference from the private sector, in addition to the public sector, will serve as an added advantage.** ➢ 5 years of experience and 2 reference letters relevant to the scope of work **= 10 points** ➢ 5 > 10 years of experience and 3 reference letters relevant to the scope of work **= 15 points** ➢ 10 > 15 years of experience and 4 references relevant to the scope of work **= 25 points** ➢ 15+ years of experience and 5 reference letters relevant to the scope of work **= 35 points** **Letters must be on company letterhead, signed, and dated. Letters must not be older than 5 years.**	**35**
TEAMS QUALIFICATIONS, PROFESSIONAL AFFILIATIONS AND-EXPERIENCE **CVs of Team Lead and members with relevant governance, board evaluation, or organizational development expertise.** The service provider must detail the technical and professional skills of the project team, detailing recent experience and relevant scope of work **(Must incl. detailed CVs (as per provided template)**	**35**

with start & end dates, as well as relevant copies of qualifications, accreditation, and affiliations from the relevant Professional Bodies (IODSA, CGISA). **The team must be made up of one (1) Team Leader and two (2) Team Members.** Scoring the proposed lead professional team's experience is to be allocated as follows: ➢ The team's average experience ranges between 1 and 5 years **=** 15 **points** ➢ The team's average experience ranges between 6 and 10 years **= 25 points** ➢ The team's average experience range is more than 10 years **= 35 points** ***Failure to populate the team's experience as per the attached CV template; omitting the start & end dates will result in a score of zero.*** The team's experience shall be determined using a simple average whereby the aggregate experience of the team members in years is divided by the size of the team. Team qualification must be attached as part of the submission (lack of submission of proof of qualification/accreditation will lead to zero scoring).	
Total points allocation	**100**

Note: Failure to obtain the minimum of 70% on functionality will result in disqualification from further evaluation.

10.3 STAGE 3 - PRICE AND SPECIFIC GOALS

10.3.1 Proposals will be subject to an evaluation based on 80/20 - 80 points for price and 20 points for specific goals.

10.3.2 A fixed price is required; the price must be inclusive of VAT and all costs relating to disbursements and accommodation. See **Annexure A**

Evaluation	Maximum points to be awarded
The relative competitiveness of the price	80
Specific Goals (see the below table)	20
Total Price and B-BBEE Points	**100**

SPECIFIC GOALS TABLE

SPECIFIC GOAL		POINTS
Black Ownership	51% - 100 %	10
	30% - 50%	6
	5% - 29%	4
	0% - 4%	0
Black Women Ownership	51% - 100 %	4
	30% - 50%	2
	5% - 29%	1
	0% - 4%	0
Black Youth Ownership	30% - 100 %	3
	5% - 29%	2
	0% - 4%	0

Disability	30% - 100 %	3
	5% - 29%	2
	0% - 4%	0
TOTAL POINTS		**20**

10.3.3 The following may be used as proof for claiming preference points

- B-BBEE Certificate or B-BBEE Affidavit,
- CSD Report,
- ID Documents of the owners of the company,
- Municipal Account or Lease Agreement, and
- Doctor's Certificate/disability database from relevant institutions (for more research).

11. SUBMISSION OF PROPOSAL

11.1 The proposals should be submitted via e-mail, by no later than 12H00 on 20 November 2026

11.2 **Submissions must be emailed to scm@kzngf.co.za with attention** to Sijabulile Ntshangase **by no later than the stipulated time above.**

11.3 **For technical queries, you can contact Thulisile Nxumalo at** thulisile@kzngf.co.za **during business hours of 8:00 am to 4:30 pm, Monday to Friday on 031 372 3720.**

Approved by

L Meyer 2026-11-09 (Electronic)

Lana Meyer
Acting Chief Executive Officer

Annexure A

NAME OF BIDDER: _____

OFFER TO BE VALID FOR 90 DAYS FROM THE CLOSING DATE OF RFQ.

Number	Description	Units	Cost
1.	**Conduct Board Evaluation as per the specifications**	**12**	
		Sub-total	
		VAT@ 15%	
		Grand Total	

Tenderer's signature……

COMPANY STAMP

PART A
INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (*NAME OF DEPARTMENT/ PUBLIC ENTITY*)					
BID NUMBER:	KZNGFA RFQ 2026 - 17	CLOSING DATE:	**20 November 2026**	CLOSING TIME:	**12H00**
DESCRIPTION	**Board Evaluation**				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT *(STREET ADDRESS)*					
Via email to scm@kzngf.co.za					

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO		**TECHNICAL ENQUIRIES MAY BE DIRECTED TO:**	
CONTACT PERSON	**Sijabulile Ntshangase**	CONTACT PERSON	**Thulisile Nxumalo**
TELEPHONE NUMBER		TELEPHONE NUMBER	
FACSIMILE NUMBER		FACSIMILE NUMBER	
E-MAIL ADDRESS	**scm@kzngf.co.za**	E-MAIL ADDRESS	**thulisile@kzngf.co.za**

SUPPLIER INFORMATION						
NAME OF BIDDER						
POSTAL ADDRESS						
STREET ADDRESS						
TELEPHONE NUMBER	CODE		NUMBER			
CELLPHONE NUMBER						
FACSIMILE NUMBER	CODE		NUMBER			
E-MAIL ADDRESS						
VAT REGISTRATION NUMBER						
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		**OR**	CENTRAL SUPPLIER DATABASE No:	MAAA	
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] ☐ Yes ☐ No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		[TICK APPLICABLE BOX] ☐ Yes ☐ No	

[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]

ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	☐Yes ☐No [IF YES ENCLOSE PROOF]	*ARE YOU A FOREIGN-BASED SUPPLIER FOR **THE GOODS /SERVICES /WORKS OFFERED?***	☐Yes ☐No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]

QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS	
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?	☐ YES ☐ NO
DOES THE ENTITY HAVE A BRANCH IN THE RSA?	☐ YES ☐ NO

DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA? ☐ YES ☐ NO

DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA? ☐ YES ☐ NO

IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? ☐ YES ☐ NO

IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.

PART B
TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:
1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
1.2. **ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.**
1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
1.4. **THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).**
2. TAX COMPLIANCE REQUIREMENTS
2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

SIGNATURE OF BIDDER: .....

CAPACITY UNDER WHICH THIS BID IS SIGNED: .....
(Proof of authority must be submitted e.g. company resolution)

DATE: .....

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

1.1 Any person (natural or juristic) may make an offer or offer 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.

1.2 Where a person/s is 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 proprietors/directors/trustees/shareholders/members/ partners or any person having a controlling interest in the enterprise, in the table below.

Full Name	**Identity Number**	**Name of State institution**

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:.....

.....

.....

[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.

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 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, or 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, before 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 before 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, suspicious bids 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

[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.

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

This preference form must form part of all the 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 apply 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**

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:

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
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 a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim regarding 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 THE 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**

$$Ps = 80\left(1 - \frac{Pt - P\,min}{P\,min}\right) \quad \text{or} \quad Ps = 90\left(1 - \frac{Pt - P\,min}{P\,min}\right)$$

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**

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

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 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—

4.2.1 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

4.2.2 any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,

then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

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

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

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

The specific goals allocated points in terms of this tender	Number of points allocated (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)
Black Ownership		10		
Black Women Ownership		4		
Black Youth Ownership		3		
Disability		3		

5. DECLARATION WITH REGARD TO COMPANY/FIRM

5.1 **Name of company/firm** .....

5.2 **Company registration number:** .....

TYPE OF COMPANY/ FIRM: [TICK APPLICABLE BOX]

- ☐ Partnership/Joint Venture / Consortium
- ☐ One-person business/sole propriety
- ☐ Close corporation
- ☐ Public Company
- ☐ Personal Liability Company
- ☐ (Pty) Limited
- ☐ Non-Profit Company
- ☐ State Owned Company

5.3 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, qualify the company/ firm for the preference(s) shown and I acknowledge that:

5.3.1 The information furnished is true and correct,

5.3.2 The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form,

5.3.3 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,

5.3.4 If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of the contract have not been fulfilled, the organ of state may, in addition to any other remedy it may:

5.3.4.1 disqualify the person from the tendering process,

5.3.4.2 recover costs, losses, or damages it has incurred or suffered as a result of that person's conduct,

5.3.4.3 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,

5.3.4.4 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

5.3.4.5 forward the matter for criminal prosecution, if deemed necessary.

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SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME: .....

DATE: .....

ADDRESS: .....

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