KZN GROWTH FUND AGENCY

APPOINTMENT OF A STRATEGIC PLANNING CONSULTANT TO FACILITATE KZNGFA STRATEGIC PLANNING SESSION

RFQ REFERENCE NUMBER – KZNGFA RFQ 2026 - 18

Closing date : **12 November 2026**

Time : 12:00

Submission format : email scm@kzngf.co.za

Name of the respondent: ……

Late bids will not be accepted

BID DETAILS

Bid title:	Appointment of a strategic planning consultant to facilitate KZNGFA strategic planning session
Procurement Reference Number:	KZNGFA RFQ 2026 – 18
Description of Goods & Services:	Strategic Planning Consultant
Date of RFQ:	06 November 2026
Date of RFQ CLOSING:	**12 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 KwaZulu-Natal Growth Fund Agency (KZNGFA) seeks to appoint a qualified, competent and experienced service provider to facilitate a strategic planning session for KZNGFA Management and Board. The outcomes of these sessions will inform the development of the new five-year Strategic Plan (2024-2029) and Annual Performance Plan for the KwaZulu-Natal Growth Fund Agency.

2. OBJECTIVE

The primary objective of this engagement is to facilitate productive strategic planning sessions that will enable the management and Board to:

2.1 Assess the current and future provincial economic landscape, including priority sectors relevant to KZNGFA such as manufacturing, agriculture, tourism, ICT, logistics and property development in order to identify opportunities for catalytic investment and development impact.

2.2 To evaluate and reaffirm the KZNGFA mandate, including institution's role as a development finance institution tasked with facilitating socio-economic development, job creation and transformation within KZN.

2.3 Interrogate the 5-year Strategic Plan (2025-2030) and identify additional strategic opportunities and priorities that will enhance KZNGFA's ability to execute its mandate. Deepen investment reach and strengthen transformation outcomes

- 2.3.1 Review the KZNFGA vision and mission statement to ensure alignment with the organisation's growth trajectory, investment strategy and provincial priorities.
- 2.3.2 Review and define strategic outcomes, objectives, and key performance indicators (KPIs)
- 2.3.3 To support implementation of the Strategic Plan and Annual Performance Plan.

2.4 To review and update the KZNGFA Situational Analysis ensuring alignment with:

- 2.4.1 Provincial and national development policies
- 2.4.2 The evolving economic and investment environment
- 2.4.3 Government priorities
- 2.4.4 Industry trends with development finance

3. BACKGROUND

KZNGFA is a provincial development finance institution established and capitalised by the KwaZulu-Natal Provincial Government to provide debt and equity funding. Its core mandate is to support initiatives that stimulate economic growth, promote job creation, and enhance socio-economic development within the province. In fulfilling this role, the KZNGFA advances Broad-Based Black Economic Empowerment (B-BBEE) by facilitating inclusive participation in the provincial economy.

3.1 Procurement Philosophy

It is the policy of 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:

a) The promotion, development and support of businesses from disadvantaged communities (small, medium, micro enterprises, as well as established businesses within those communities) in terms of its BEE Policy;
b) The promotion of national and regional local service providers and agents before considering overseas service providers and;
c) The development, promotion and support for the moral values that underpin the above, in terms of KZNGFA Business Ethics and Guidelines which requires 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 who are equally committed to maintain high quality services and better pricing.

4. SCOPE OF SERVICES REQUIRED

The scope of work includes the following:

4.1 Conduct a thorough review of KZNGFAs existing strategic documents, performance reports and relevant sector data.
4.2 Engage with the relevant KZNGFA team to plan for the workshop and understand expectations.
4.3 Prepare materials, presentations, and exercises to facilitate discussions and decision making
4.4 Facilitation of the strategic planning session for both Executive Management and the Accounting Authority (Board):
4.4.1 Lead and guide the planning sessions, ensuring active participation and engagement from Executive Management and Board members.
4.4.2 Foster a collaborative and inclusive environment that supports constructive dialogue, strategic reflection and effective decision making.
4.4.3 Guide discussions on vision, mission, values, strategic outcomes and performance measures.
4.4.4 Facilitate SWOT analysis, scenario planning, and other strategic planning tools and techniques.
4.4.5 Document key insights, decisions and action points arising from the sessions.
4.5 Report the outcomes of the sessions.
4.5.1 Consolidate the outcomes from the planning sessions into a comprehensive strategic planning report.

4.5.2 Present the findings and recommendations to management.

4.5.3 Incorporate feedback and finalize strategic planning documents, including 5-year strategic plan, and annual performance plan.

4.5.4 Drafting of KZNGFA Strategic Planning documents (i.e. Strategic Plan 2024-2029, Annual Performance Plan 2026/27).

5. DURATION

The duration of the facilitation will be over 4 (four) days, two days for the KZNGFA EXCO and Management Team between **(17 – 20 November 2026)** and two (2) days for the KZNGFA Board of Directors between **(30 November – 3 December 2026)**.

6. EXPERTISE AND CAPACITY

Proven track record/experience in strategic planning facilitation work (CVs of lead consultants providing relevant skills, competence, and experience to be attached).

6.1 Public sector knowledge

6.2 Knowledge of the Revised Framework for Strategic Plans and Annual Performance Plans and planning processes therein.

NOTES:

- **Please attach a one-page CV to verify your years of experience and certifications. Use the format provided in Annexure B as a guideline for your submission.**
- **Please attach all relevant copies of your qualifications and certifications as listed on the one-page CV.**

7. AWARD OF THE RFQ

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

8. EVALUATION PROCESS AND CRITERIA

Selection will be conducted over three stages as detailed **BELOW**:

Stage 1 - Compliance with Minimum Requirements

Stage 2 – Functionality Evaluation

Stage 3 – Price and Specific Goals

8.1 STAGE 1 – COMPLIANCE WITH MANDATORY REQUIREMENTS

All proposals must be completed and accompanied by the below compliance requirements:

8.1.1 Signed and completed RFQ document of bidder's details (page 2)

8.1.2 SBD 1, SBD 4 and SBD 6.1

8.1.3 Evidence of registration on the National Treasury Central Supplier Database (MAAA) which confirms Tax Compliance Status.

All proposals **must** be accompanied by the below mandatory requirement:

8.1.4 Company Profile detailing the company's experience and expertise in strategy formulation

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

8.2 FUNCTIONALITY EVALUATION

Scores will be tabulated to 50 points. Respondents must score 35 points and over to be assessed on their financial offer and preference score.

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

FUNCTIONAL EVALUATION CRITERIA	Weight
REFERENCE LETTERS Contactable reference letters from previous clients as evidence of previous related work for strategy planning and development successfully completed. 3 Letter of Reference relevant to the scope of work **– 15 points.** 2 Letter of Reference relevant to the scope of work **– 10 points.** 1 Letter of Reference relevant to the scope of work **– 5 points** **Letters must be on client letterhead, signed, and dated. Letters must not be older than 5 years.**	**15**

FUNCTIONAL EVALUATION CRITERIA	Weight
QUALIFICATION OF THE FACILITATOR Bidders must attach relevant proof of qualifications and professional competencies in Strategic Management, Business Administration, Risk Management, Organisational Development or a related field. • Postgraduate degree **= 10 points** • Any other relevant undergraduate qualification **= 5 points** • Irrelevant/less qualification **= 0 points** Failure to attach proof of qualifications will result in a score of zero.	**10**
EXPERIENCE OF THE FACILITATOR The potential bidder must attach brief CV indicating relevant experience in strategy formulation • Experience 6 years or more relevant experience in strategy formulation **= 10 points** • 0 to 5 years of relevant experience in strategy formulation **= 5 points** • Less than 5 years of relevant experience in strategy formulation **= 0 points** **Failure to submit a one-page CV using Annexure B will result in a score of zero.**	**10**
METHODOLOGY AND APPROACH: Bidder must provide clarity and an effective approach to facilitation of the strategic session. • The bidder should demonstrate knowledge of strategic planning principles, tools, and best practices and how they will assist management translate strategic goals into actionable plans. • Bidder must demonstrate understanding of organisations context, mission, and objectives of the KZNGFAs, this should include the awareness of the organization's mandate, stakeholders, and operating environment. • Indicate how the facilitator will synthesize information and present findings effectively. • The methodology and approach align to the scope of work; the timeframes and project plan are suited and tailored to the project needs. = **15 points.** • The methodology and approach partially align to the scope of work and expectations = 1**0 points**. • The proposed methodology and approach are generic and minimally meets projects requirements. = **5 points.** • Non-submission **= 0 points**	**15**
Total points allocation	**50**
Percentage (%) points allocation	**70%**
Minimum points required	**35**

8.3 STAGE 2 - PRICE AND SPECIFIC GOALS

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

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

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

SPECIFIC GOALS TABLE

SPECIFC 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**

The following may be used as proof for claiming preference points

- BBBEE Certificate or BBBEE Affidavit
- CSD Report
- ID Documents of the owners of the company
- Doctors Certificate / disability database from relevant institutions (for more research)

9. THE INFORMATION REQUIRED

You are required to provide the KZNGFA with a proposal, by **no later than 12:00pm on**

13 November 2025.

10. SUBMISSION DETAILS

- Submissions must be emailed to scm@kzngf.co.za attention **Sijabulile Ntshangase** by no later than the stipulated time above.
- For technical queries, you can contact Mxolisi Dlamini on scm@kzngf.co.za during business hours of 8:00am to 4:30pm, Monday to Friday on 031 372 3720.

Approved by



L Meyer 2026-11-05 (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.

Task	Duration	Pricing
1. Facilitation of the Executive Management Strategic Session	2 days	
2. Facilitation of the Board of Directors Strategic Session	2 days	
3. Drafting of KZNGFA Strategic Planning documents (i.e. Strategic Plan 2024-2029, Annual Performance Plan 2026/27).		
4. Disbursements*		
	Sub-Total	
	VAT	
	GRAND TOTAL	

***Disbursement must be all inclusive costs (Flights, Accommodation and Transportation)**

Tenderers signature……

COMPANY STAMP

ANNEXURE B

Curriculum Vitae

1. **Role**

Name and Surname	
Current Job Title	
Project Role for KZNGFA (e.g. Technical Resource)	

2. **Relevant Qualifications/Certifications**

Qualification	Institution	Year Obtained	Expiry Date (if any)

3. **Relevant Experience**

Company Name	Position	Key responsibility	Start Date	End Date

4. **References**

Name	Company Name	Position	Relationship

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 - 18	CLOSING DATE:	**12 November 2026**	CLOSING TIME:	**12pm**
DESCRIPTION	Appointment of a strategic planning consultant to facilitate KZNGFA strategic planning sessions				

BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT *(STREET ADDRESS)*

scm@kzngf.co.za

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO		**TECHNICAL ENQUIRIES MAY BE DIRECTED TO:**	
CONTACT PERSON	**Sijabulile Ntshangase**	CONTACT PERSON	**Mxolisi Dlamini**
TELEPHONE NUMBER	**031 372 3720**	TELEPHONE NUMBER	
FACSIMILE NUMBER		FACSIMILE NUMBER	
E-MAIL ADDRESS	scm@kzngf.co.za	E-MAIL ADDRESS	scm@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]

1	ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	☐Yes ☐No [IF YES ENCLOSE PROOF]	**2**	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

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest1 in the enterprise,
employed by the state? **YES/NO**

2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

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

[1] the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

2.2.1 If so, furnish particulars:

……

……

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

2.3.1 If so, furnish particulars:

…….

3 DECLARATION

I, the undersigned, (name)……. in submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

3.1 I have read and I understand the contents of this disclosure;

3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;

3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium2 will not be construed as collusive bidding.

3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.

[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.

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

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:

- 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**

(*delete whichever is not applicable for this tender*).

~~a) The applicable preference point system for this tender is the 90/10 preference point system.~~

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

~~c) Either the 90/10 or 80/20 preference point system will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.~~

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**

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

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—

(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	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		

DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name of company/firm…….

4.4. Company registration number: ……...

4.5. TYPE OF COMPANY/ FIRM

- ϒ Partnership/Joint Venture / Consortium
- ϒ One-person business/sole propriety
- ϒ Close corporation
- ϒ Public Company
- ϒ Personal Liability Company
- ϒ (Pty) Limited
- ϒ Non-Profit Company
- ϒ 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: ……