

**KZN GROWTH FUND AGENCY
REQUEST FOR QUOTATION (RFQ)**

RFQ REFERENCE NUMBER – RFQ OVF-2026-HAR-PAYMENTS-01

**THE IMPLEMENTATION, OPERATION AND SUPPORT OF A CARD-BASED/VOUCHER GRANT
DISBURSEMENT SOLUTION FOR HARRY GWALA DISTRICT - ONCE-OFF/ONE MONTH PE-
RIOD**

Closing date : **30 October 2026**

Time : 11:00 AM

Submission format : Email scm@kzngf.co.za

Name of the respondent:

Late bids will not be accepted

KWAZULU-NATAL GROWTH FUND AGENCY (KZNGFA) REQUEST FOR QUOTATION (RFQ)

TENDER REF: RFQ OVF-2026-HAR-PAYMENTS-01
THE IMPLEMENTATION, OPERATION AND SUPPORT OF A CARD-BASED/VOUCHER
GRANT DISBURSEMENT SOLUTION FOR HARRY GWALA DISTRICT — ONCE-OFF / ONE
MONTH PERIOD

1. RFQ PARTICULARS & KEY TENDER DETAILS

RFQ PARTICULAR	OFFICIAL SPECIFICATION / DETAIL
Procurement Reference	KZNGFA- RFQ OVF-2026-HAR-PAYMENTS-01
Procuring Entity	KwaZulu-Natal Growth Fund Agency (KZNGFA)
Service Requirement	Implementation, operation and support of a card-based/voucher grant disbursement solution for Harry Gwala District
Target Population & Scope	190 Approved Beneficiaries in Harry Gwala District at a maximum grant cap of R50,000.00 per beneficiary
Contract Period	Once-Off / One Month Period from commencement date stated in signed SLA / Purchase Order
Issue / Advert Date	Monday, 26 October 2026
Closing Date and Time	Friday, 30 October 2026 at 11:00 AM
Submission Email Address	scm@kzngf.co.za (Attention: Mthokozisi Magcaba / Nicolette Napier)
Procurement Enquiries	SCM Unit, KZNGFA — Email: scm@kzngf.co.za Tel: 031 372 3753
Bid Validity Period	90 Calendar Days from closing date
Evaluation Framework	80/20 Preference Point System (PPPFA Act 5 of 2000 & PPR 2022)

2. EXECUTIVE PURPOSE & PROGRAMME BACKGROUND

The KwaZulu-Natal Growth Fund Agency (KZNGFA) invites suitably qualified, accredited, and experienced payment platform service providers to submit complete technical and financial proposals for the implementation, operation, and ongoing support of a card-based / voucher grant disbursement solution tailored for the Harry Gwala District Municipality area.

The primary objective of this disbursement solution is to establish a secure, controlled, and fully traceable payment mechanism for distributing approved grant funding to 190 verified micro-enterprises and informal business beneficiaries in Harry Gwala District. The solution must ensure that grant funds are strictly utilized for authorized business assets, equipment, and stock purchases through approved suppliers, providing complete real-time transaction visibility, audit trails, and financial reconciliation.

Procurement Philosophy & SCM Governance Principles

It is the policy of KZNGFA, when procuring goods and obtaining services, to achieve optimal value for money, operational efficiency, and transparency by adopting best procurement practices under the Public Finance Management Act (PFMA Act 1 of 1999), Treasury Regulation 16A, and PPPFA Regulations 2022. Commercial conduct is governed by strict ethical principles, equal opportunity, and the promotion of Black-owned enterprises.

3. SCOPE OF SERVICES / TERMS OF REFERENCE

The appointed service provider will be required to configure, deploy, operate, support, and maintain a secure payments platform for the Harry Gwala District disbursement package for a Once-Off / One Month contract period. The service provider shall, at minimum, deliver the following functional capability:

- Web-Based Multi-User Platform:** Provide a secure, browser-accessible web platform for authorized KZNGFA administrators, field officers, and participating suppliers, complete with role-based access control and multi-user supplier accounts.
- Beneficiary Record & Balance Validation:** Validate beneficiaries against KZNGFA-approved baseline records (190 approved beneficiaries), displaying real-time beneficiary balances, eligible commodity lists, approved limits (up to R50,000.00), and remaining card/voucher balances.
- Controlled Voucher/Card Disbursement:** Support controlled voucher or card issuance, loading, redemption, and transaction status tracking. The platform must enforce strict validation controls to prevent duplicate loading, unauthorized redemptions, or over-limit spending.
- Supplier Claim & Document Management:** Provide functionality for participating suppliers to submit redemption claims, upload tax invoices, delivery notes, and supporting proof-of-delivery documents, view transaction history, and submit dispute resolution queries.
- Real-Time Reporting & Analytics:** Offer real-time or near-real-time transaction visibility with downloadable operational and financial reports covering beneficiary allocations, voucher/card issuance, redemptions, transaction reversals, system exceptions, supplier claims, and daily/monthly reconciliations.
- System Integration & Secure Data Exchange:** Enable secure automated data exchange or API integration with KZNGFA internal financial and reporting systems, subject to technical authorization and data governance prescripts.
- Information Security & POPIA Compliance:** Implement robust cyber security arrangements, data encryption at rest and in transit, multi-factor authentication, role-based access, automated backups, disaster recovery, redundancy, and strict compliance with the Protection of Personal Information Act (POPIA).
- Implementation, Testing & User Training:** Deliver a detailed project implementation plan, configuration schedule, comprehensive user acceptance testing (UAT), user training guides, and hands-on onboarding for KZNGFA personnel and participating suppliers.
- Operational Support & Helpdesk SLAs:** Maintain a dedicated technical helpdesk, responsive customer support facilities, incident escalation channels, and monthly service-level agreement (SLA) performance reporting throughout the contract term.
- Confidentiality & Data Protection:** Treat all beneficiary identity records and transaction details as strictly confidential. Data must be used exclusively for contract execution and securely returned or archived upon contract conclusion.
- Immutable Audit Trail & Activity Logging:** Maintain an immutable, fully auditable log of all user activities, system configuration changes, financial transactions, card loadings, redemptions, reversals, and financial reconciliations.
- Exit Management & Knowledge Transfer:** Provide comprehensive exit and transition assistance, exporting all historical transaction data in a usable format and executing complete knowledge transfer upon contract expiry.

4. KEY DELIVERABLES & TARGET TIMELINES

Contract execution will be monitored against seven (7) primary deliverables. Acceptance is subject to formal written sign-off by the nominated KZNGFA Contract Manager:

DELIVERABLE	MINIMUM ACCEPTANCE EVIDENCE / REQUIREMENT	TARGET TIMELINE
1. Inception & Project Plan	Named project team structure, governance framework, implementation milestones, risk register, and communication matrix.	Within 5 working days of commencement
2. Solution Design & Security Plan	System architecture diagram, role/access matrix, data flow diagrams, security controls, and backup/DR strategy.	Within 10 working days of commencement
3. Configured Test Environment	Demonstrable sandbox environment for beneficiary validation, balance tracking, voucher/card transactions, claims, and reporting.	As per approved implementation schedule
4. Testing & User Training	Test scripts, defect resolution logs, user acceptance testing (UAT) sign-off, user manuals, and training attendance registers.	Prior to live deployment
5. Go-Live Readiness & Support	Approved go-live checklist, operational support roster, escalation contacts, and platform activation sign-off.	Only after written KZNGFA approval
6. Reporting & Financial Reconciliation	Comprehensive transaction logs, exception reports, supplier claim reports, reconciliation files, and performance metrics.	Weekly and Once-Off / Month-end
7. Exit, Handover & Data Export	Complete historical transaction data export, final reconciliation sign-off, and transition support.	At service Month-end or contract termination

5. MANDATORY ADMINISTRATIVE REQUIREMENTS

Bidders must complete and submit all mandatory returnable documents. Failure to submit any mandatory administrative requirement will render the bid non-responsive and result in immediate disqualification:

SBD 1 Invitation to Bid: Fully completed and signed official SBD 1 form (Part A and Part B).

SBD 4 Bidder's Disclosure: Fully completed and signed SBD 4 declaration of interest and ownership details.

SBD 6.1 Preference Claim Form: Fully completed and signed SBD 6.1 preference claim form under the 80/20 preference point system.

National Treasury CSD Registration: Valid Central Supplier Database (CSD) registration summary report reflecting active status (MAAA number).

SARS Tax Compliance Status Pin: Valid Tax Compliance System PIN issued by SARS for independent online tax verification.

Company Registration Documents: Official CIPC registration certificates confirming entity directors and active legal status.

Proof of Signatory Authority: Signed corporate resolution or power of attorney authorizing the signatory to bind the company.

Preference Goal Supporting Proof: Valid B-BBEE Certificate or CIPC B-BBEE Sworn Affidavit, CSD report, and owner ID documents.

JV / Consortium Agreement: Duly executed Joint Venture agreement and complete compliance returnables for each member entity (if bidding as a JV).

Failure to provide any mandatory information as requested above will result in the submission being deemed non-responsive.

6. THREE-STAGE BID EVALUATION PROCESS

Proposals will be evaluated strictly in accordance with the 3-stage evaluation framework below:

Stage 1: Technical Functionality Evaluation (100 Points | Minimum Threshold: 70 Points)

Bidders passing administrative screening will be evaluated against the technical functionality criteria below. A bidder must score a minimum of 70.00 out of 100.00 points to qualify for Stage 2 (Demonstration):

EVALUATION CRITERION	SPECIFICATION & EVIDENTIARY REQUIREMENT	MAX WEIGHT
1. Relevant Company Experience	Experience in implementing payment platforms, card management, or electronic grant disbursement solutions. Must attach signed client reference letters on client letterheads (max 5 yrs old). • 1 qualifying reference letter = 10 pts • 2 qualifying reference letters = 20 pts • 3+ qualifying reference letters (inc. at least 1 public sector/grant disbursement) = 30 pts	30 Points
2. Key Personnel & Technical Capacity	Qualifications and experience of dedicated project team: • Project Manager (6 pts): PM certificate/qualification (3 pts) + 5+ years relevant PM experience (3 pts). • Technical Specialist (15 pts): IT Diploma/Degree (6 pts) + payment system certifications & 3+ years' experience (9 pts). • Training & Support Specialist (9 pts): Training qualification (4 pts) + 3+ years user training experience (5 pts).	30 Points
3. Authority Accreditation & Security Credentials	Proof of relevant industry accreditations: PASA accreditation, SARB payment system participation/sponsorship, PCI DSS compliance, or ISO 27001 Information Security certification.	10 Points
4. Insurance Coverage	Valid proof of any of the below insurance policies: • Professional Indemnity Insurance (4 pts) • Public Liability Insurance (3 pts) • Cyber Liability / Crime Insurance (3 pts)	10 Points
5. Financial Sustainability	Submission of independently audited or reviewed Annual Financial Statements (AFS) for the last two (2) financial years demonstrating liquidity and financial stability.	10 Points
6. Project Plan & Implementation Methodology	Comprehensive methodology covering phased deployment, sandbox testing, UAT, risk management, security controls, supplier onboarding, and handover (0 = non-responsive, 5 = generic, 10 = comprehensive).	10 Points
TOTAL FUNCTIONALITY SCORE	MINIMUM QUALIFYING THRESHOLD = 70.00 / 100.00 POINTS	100 Points

Stage 2: Solution Demonstration Evaluation (50 Points | Minimum Threshold: 35 Points / 70%)

Bidders scoring at least 70.00 points in Stage 1 will be invited to demonstrate a working system in a controlled mock environment. Bidders must achieve at least 35.00 out of 50.00 points (70%) to proceed to Stage 3:

DEMONSTRATION FEATURE	FUNCTIONAL SCOPE TO BE DEMONSTRATED	MAX WEIGHT
Ease of Navigation & UI Clarity	Clear menus, logical workflows, intuitive interface for non-technical users	6 Points
Secure Supplier Login & Accounts	Multi-user supplier accounts, multi-factor authentication, permission controls	4 Points
Beneficiary Validation & Balances	Live beneficiary validation against baseline database, real-time balance display	4 Points
Approved Commodity & Quantity Controls	Validation of items against approved lists, enforcement of limits	4 Points
Supplier Claim & Document Uploads	Online claim submission, tax invoice and proof of delivery uploads	4 Points
Voucher/Card Redemption & Reporting	Real-time card loading, redemption status, transaction logs, downloadable reports	6 Points
Supplier Dispute & Exception Handling	Dispute log, query escalation, transaction reversals, exception tracking	2 Points
Responsive Web & Mobile Access	Multi-device compatibility, responsive mobile/tablet interface	4 Points
Cloud-Ready Architecture & Hosting	Scalable SaaS/cloud infrastructure, high availability, secure hosting	4 Points
Redundancy, Backups & Disaster Recovery	Automated backup schedules, failover mechanisms, disaster recovery controls	4 Points
Monitoring & Performance Controls	System uptime monitoring, response time tracking, transaction throughput	4 Points
Security, Audit Logs & Reconciliation	Immutable audit logging, role-based security, end-to-end financial reconciliation	4 Points
TOTAL DEMO SCORE	MINIMUM QUALIFYING THRESHOLD = 35.00 / 50.00 POINTS (70%)	50 Points

Stage 3: Price and Specific Goals Evaluation (80/20 Preference Point System)

Only bidders qualifying through Stage 1 and Stage 2 will be evaluated on Price (80 points) and Specific Goals (20 points) in terms of PPPFA Regulations 2022:

Price Point Calculation (80 Points): Price Formula: $P_s = 80 * (1 - (P_t - P_{min}) / P_{min})$

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

The following may be used as proof for claiming preference points

- BBEE Certificate or BBEE Affidavit
- **CSD Report**
- ID Documents of the owners of the company
- Municipal Account or Lease Agreement
- Doctors Certificate / disability database from relevant institutions (for more research)

4. SUBMISSION DEADLINE

You are requested and required to provide the KZNGFA with a quotation by **no later than 11:00 am on the 30 October 2026**.

5. SUBMISSION DETAILS

- Submissions can be emailed to scm@kzngf.co.za; attention **Mthokozisi Magcaba** by no later than the stipulated time above.

APPROVED 

 doxit.co.za
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MXOLISI DLAMINI
Acting Chief Financial Officer

7. OFFICIAL BINDING PRICING SCHEDULE

Bidders must complete and submit the firm binding price schedule below in South African Rand (ZAR) for the complete Once-Off / One Month contract period. Pricing is based on a baseline population of 190 beneficiaries at an approved grant cap of up to R50,000.00 per beneficiary in Harry Gwala District:

COST COMPONENT	UNIT BASIS	QTY / AS-SUMP.	UNIT EXCL. VAT	VAT (15%)	TOTAL INCL. VAT
1. Implementation, Platform Configuration & Onboarding	Once-Off	1 Package			
2. Platform Licence, Hosting & Cyber Security (1 Month)	Once-Off / Month	1 Month			
3. Card / Voucher Issuance, Production & Loading Charges	Per Unit / Batch	190 Beneficiaries			
4. Transaction & Redemption Fee Rate	Per Transaction	Estimated Volume			
5. System Integration & Automated Data Exchange	Once-Off	1 Linkage			
6. User Training & Handholding (KZNGFA & Suppliers)	Once-Off	1 Package			
7. Technical Helpdesk, Maintenance & Monthly Reporting	Once-Off / Month	1 Month			
8. Exit Management, Data Export & Handover Support	Once-Off	1 Package			
SUBTOTAL EXCLUDING VAT (R)					
VALUE ADDED TAX (VAT 15%) (R)					
GRAND TOTAL EVALUATED PRICE INCL. VAT (R)					

8. PROCUREMENT TIMELINE & SUBMISSION INSTRUCTIONS

The procurement workflow will strictly adhere to the official administrative timeline below:

PROCUREMENT STAGE / ACTIVITY	OFFICIAL SCHEDULED DATE	DURATION
Public Advert on Website & eTender Portal	Monday, 26 October 2026	Publication
Public Bidding & Advertising Window	Monday, 26 October – Friday, 30 October 2026	5 Working Days
RFQ Closing Date and Time	Friday, 30 October 2026 at 11:00 AM	Closing Deadline
Preliminary Compliance Assessment	Friday, 30 October 2026	1 Working Day
Functionality Assessment & Solution Demonstrations	Friday, 30 October 2026	1 Working Day
Price and Specific Goals Evaluation	Friday, 30 October 2026	1 Working Day
Finalize BEC Evaluation Report & Recommendations	Monday, 2 November 2026	1 Working Day
BAC Consideration & Award Approval	Monday, 2 November 2026	1 Working Day
Contract & SLA Signing	Tuesday, 3 November 2026	1 Working Day
Pre-Issue Administration & Supplier Onboarding	Tuesday, 3 November – 10 November 2026	5 Working Days

Annexure A

NAME OF BIDDER: _____

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

**PART A
INVITATION TO BID**

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)					
BID NUMBER:	RFQ OVF-2026-HAR-PAYMENTS-01	CLOSING DATE:	30 October 2026	CLOSING TIME:	11h00
DESCRIPTION	THE IMPLEMENTATION, OPERATION AND SUPPORT OF A CARD-BASED/VOUCHER GRANT DISBURSEMENT SOLUTION FOR HARRY GWALA DISTRICT - ONCE-OFF/ONE MONTH PE-RIOD				
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	Nicolette Napier		CONTACT PERSON	Mthokozisi Magcaba	
TELEPHONE NUMBER	031 372 3720		TELEPHONE NUMBER	031 372 3720	
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 DATA-BASE 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]					
THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	☐ Yes ☐ No [IF YES ENCLOSE PROOF]		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

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 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.

.....
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 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

(delete whichever is not applicable for this tender).

- a) 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

4.1. 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

$$Ps = 80 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

4.2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

4.2.1. POINTS AWARDED FOR PRICE

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

80/20

$$Ps = 80 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)$$

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

- ☐ 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:

.....

C16. CURRICULUM VITAE TEMPLATE

Curriculum Vitae

1. Role – Key Resource

Name and surname	
Residential Address	
Project Role	

2. Relevant Qualifications/Certifications

Name of Certificate	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