



RFQ NUMBER	RFQ/MICT/36/2025
RFQ DESCRIPTION	APPOINTMENT OF SERVICE PROVIDER FOR THE CONCEPTULISATION, DESIGN, LAYOUT, EDITING AND PRINTING OF THE MICT SETA 2024/2025 ANNUAL REPORT
RFQ ISSUE DATE	19 June 2025
BRIEFING SESSION	N/A
CLOSING DATE & TIME	26 June 2025 @ 11:00 AM South African Time, RFQ submitted after the stipulated closing date and time will not be considered.
LOCATION FOR SUBMISSIONS	MICT SETA Head office Level 3 West wing, Gallagher House 19 Richards Drive, Halfway House Midrand
NO: OF DOCUMENTS	1 HARD COPY

For queries, please contact [rfqs@mict.org.za](mailto:rfqs@mict.org.za) before the closing date of this RFQ.

The MICT SETA requests your quotation on the services listed above. Please furnish us with all the information as requested and return your quotation on the date and time stipulated above.

**Late and incomplete submissions will invalidate the quote submitted.**

SUPPLIER NAME: \_\_\_\_\_

NATIONAL TREASURY (CSD) SUPPLIER NUMBER: \_\_\_\_\_

POSTAL ADDRESS: \_\_\_\_\_

TELEPHONE NO: \_\_\_\_\_

E MAIL ADDRESS: \_\_\_\_\_

CONTACT PERSON: \_\_\_\_\_

CELL NO: \_\_\_\_\_

SIGNATURE OF BIDDER: \_\_\_\_\_

#### **SUPPLIER REGISTRATION ON CSD**

Prospective suppliers must register on the National Treasury Central Supplier database in terms of National Treasury circular no 4A of 2016/17. The bidder shall register prior submitting a proposal/bid.

## MICT SETA: CHECKLIST INFORMATION

### RETURNABLE DOCUMENTS CHECKLIST

**Request For Quotation invitation document must be completed, signed and submitted as a whole** by the authorised Company representative. All forms must be properly completed, list below serve as a checklist of your RFQ submission.

**(Tick in the relevant block below)**

DESCRIPTION	YES	NO
<b>CSD</b> Central Supplier Database (CSD) Registration Report		
Pricing Schedule		
Valid Tax Clearance Certificate (S) and/or proof of application endorsed by <b>SARS</b> and/or <b>SARS-issued</b> verification pin		
<b>SBD 4 – Bidder's Disclosure</b>		
<b>SBD 6.1 - Preferential Procurement Claim Form</b>		
Certified Copy of director(s) ID(s) not older than (six) 6 months		
CIPC Document		
Shareholding Certificate		
<b>Bidder's eligibility: Form A</b>		

**Note: This RFQ must be completed by the authorised company representative**

**1. QUOTATION CONDITIONS**

NOTE: Quotation for the supply of goods or services described in this document are invited in accordance with the provision of Government Procurement: General Conditions of Contract available for download from <http://www.treasury.gov.za/divisions/ocpo/sc/GeneralConditions/>

- a. **MICT SETA** does not bind itself to accept the lowest or any RFQ, nor shall it be responsible for or pay any expenses or losses which may be incurred by the bidder in the preparation and delivery of the RFQ.
- b. No RFQ shall be deemed to have been accepted unless and until a formal contract/letter of intent is prepared and executed.

**1.1 MICT SETA reserves the right to:**

- a. Not evaluate and award RFQ that do not comply strictly with the requirements of this RFQ.
- b. Make a selection solely on the information received in the RFQs and Enter into negotiations with any one or more of the preferred bidder(s) based on the criteria specified in the evaluation of this RFQ.
- c. Contact any bidder during the evaluation process, in order to clarify any information, without informing any other bidders, and no change in the content of the RFQ shall be sought, offered, or permitted.
- d. Award a contract to one or more bidder(s).
- e. Withdraw the RFQ at any stage
- f. Accept a separate RFQ or any RFQ in part or full at its own discretion.
- g. Cancel this RFQ or any part thereof at any stage as prescribed in the PPPFA regulation.
- h. Select the bidder(s) for further negotiations based on the greatest benefit to MICT SETA and not necessarily on the basis of the lowest costs

**2. COST OF BIDDING**

The bidder shall bear all costs and expenses associated with the preparation and submission of its RFQ or RFQ, and the MICT SETA shall under no circumstances be responsible or liable for any such costs, regardless of, without limitation, the conduct or outcome of the bidding, evaluation, and selection processes.

## FORM A: BIDDER'S ELIGIBILITY FORM

Name of Bidder:

RFQ Number:

We, the undersigned, offer to provide the required services in accordance with the above Request for quotation and hereby declare that our firm, persons, or its directors, including any JV/Consortium /Association members or subcontractors or suppliers for any part of the contract:

- a) is not under procurement prohibition by National Treasury, *from doing business with the public sector,"*
- b) have not declared bankruptcy, are not involved in bankruptcy or engaged in corrupt / fraudulent practices, and there is no judgment or pending legal action against them that could impair their operations in the foreseeable future;
- c) undertake not to engage in prescribed practices, including but not limited to corruption, fraud, coercion, collusion, obstruction, or any other unethical practice, with the MICT SETA or any other party, and to conduct business in a manner that averts any financial, operational, reputational or other undue risk to the MICT SETA.
- d) *We declare that all the information and statements made in this Proposal are true and we accept that any misinterpretation or misrepresentation contained in this RFQ submission may lead to elimination of our RFQ submission.*

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

**REQUIREMENT DESCRIPTION: APPOINTMENT OF SERVICE PROVIDER FOR THE CONCEPTULISATION, DESIGN, LAYOUT, EDITING AND PRINTING OF THE MICT SETA 2024/2025 ANNUAL REPORT**

## **1. INTRODUCTION**

The Media, Information and Communication Technologies Sector Education and Training Authority ("MICT SETA") is established in terms of section 9(1) of the Skills Development Act, 1998 (Act No. 97 of 1998), and is responsible for achieving South Africa's skills development and economic growth within the following five sub-sectors: advertising, film and electronic media, electronics, information technology and telecommunications.

MICT SETA is mandated to advance the national skills agenda by developing occupationally directed qualifications, facilitating learning programmes, and fostering partnerships that address the demands of the Fourth Industrial Revolution (4IR). In line with its mandate and good corporate governance, MICT SETA publishes an Annual Report to account for its strategic performance and financial position.

The Annual Report is submitted to the Department of Higher Education, and Training (DHET), the National Treasury, the Auditor General of South Africa (AGSA), Department of Planning, Monitoring and Evaluation (DPME) and Parliament. As such, its presentation must reflect precision, compliance, professionalism, and innovation aligned to the identity of the MICT SETA and its sectors.

## **2. OBJECTIVE**

The objective of this Terms of Reference (ToR) is to appoint a competent service provider to manage the full production cycle of the 2024/25 MICT SETA Annual Report. This includes conceptualisation, content integration, editing, layout, design, printing, and the delivery of both physical and digital formats, ensuring version control and adherence to timelines for various stakeholder submissions.

The appointed service provider will also be required to develop a condensed A5 summary booklet and a PowerPoint presentation that reflects the highlights of the Annual Report, along with an online interactive flipbook version.

## **3. SCOPE OF WORK / DELIVERABLES**

### **3.1 Conceptualisation**

- 3.1.1. Propose three (3) thematic concepts aligned with MICT SETA's sub-sectors and 4IR developments.
- 3.1.2. Include rationales that contextualise the proposed theme in relation to MICT SETA's mandate.
- 3.1.3. Theme must reflect innovation, impact, digital transformation, and relevance to MICT SETA stakeholders.
- 3.1.4. Design the overall visual identity of the Annual Report including layout grid, typography, iconography, colour palette, and styling of graphs, tables and images.

### **3.2 Photography & Visual Content**

- 3.2.1. Two half-day photoshoots of Board Members, Management, and identified stakeholders.
- 3.2.2. Secure and source photo stock imagery reflecting all five MICT sub-sectors.
- 3.2.3. All images must be high-resolution, professionally retouched, and rights cleared.

### **3.3 Design and Layout**

- 3.3.1. Design and layout of an estimated 150 pages + 4-page cover.
- 3.3.2. Infographics, custom graphs and 3D charts reflecting MICT SETA performance indicators.
- 3.3.3. Cover: 350 gsm Gloss UV varnish and Skodix elements.
- 3.3.4. Inner pages: 148 gsm Matt Art.
- 3.3.5. Divider pages: 170 – 200 gsm (gloss for images)
- 3.3.6. Ensure consistency in layout, page headers/footers, and branding.
- 3.3.7. Proofing and colour-matching to be done before printing.

### **3.4 Content Management**

- 3.4.1. Import, typeset, and manage all copy provided by MICT SETA.
- 3.4.2. Conduct three rounds of professional proofreading:
  - a) Pre-approval by Accounting Authority
  - b) Submission to National Treasury, AGSA, and DHET
  - c) Final submission to Parliament
- 3.4.3. Ensure meticulous version control and feedback tracking through a collaborative platform.
- 3.4.4. Ensure readability, logical flow, and grammar accuracy.

### **3.5 Pre-Press and Printing**

- 3.5.1. Generate Bureau - ready files for final printing.
- 3.5.2. Provide printers' proof and colour correction samples.
- 3.5.3. Lithographic printing of 400 copies:
  - a) 150 copies to MICT SETA Head Office
  - b) 145 copies to 4x MICT SETA regional offices
  - c) 60 copies to Parliament
  - d) 31 copies to DHET
  - e) 10 copies to AGSA
  - f) 2 copies each to National Treasury offices and Department of Planning Monitoring and Evaluation

### **3.6 Electronic Versions and Supplementary Outputs**

- 3.6.1. Produce an online flipbook version for website integration.
- 3.6.2. Deliver Final Annual Report on USB / online platform in Hi -res PDFs and Word formats, and low-res versions.
- 3.6.3. Develop an A5 summary booklet (32 pages) aligned with the Annual Report design.

### **3.7 Technical specifications for the A5 Booklet:**

- 3.7.1. Quantity: 100 copies
- 3.7.2. Size: A4 folded to A5
- 3.7.3. Orientation: Portrait
- 3.7.4. Cover Pages: 4 pages, 250gsm with gloss UV Varnish
- 3.7.5. Inner Pages: Approximately 32 pages, 148gsm Matt Art
- 3.7.6. Binding: Saddle stitched, folded, collated and trimmed to size
- 3.7.7. Colour: Full colour throughout

### **3.8 PowerPoint Presentation**

- 3.8.1 Design a summarised PowerPoint presentation of the 2024/25 Annual Report highlights
- 3.8.2 Style must align with the approved report design and include infographics where appropriate
- 3.8.3 Text will be provided by MICT SETA

## **4. METHODOLOGY & PROJECT PLAN**

Bidders are required to submit a comprehensive methodology detailing their:

- 5.1. Understanding of the scope and objectives
- 5.2. Step-by-step approach for:
  - a) Conceptualisation
  - b) Theme development and visual planning
  - c) Layout, proofing and feedback cycles
  - d) Content management and version control
  - e) Printing and delivery schedule
- 5.3. Risk mitigation plan
- 5.4. Quality assurance processes
- 5.5. Proposed communication and sign-off procedures

**The project plan must include:**

- a) Timelines for each phase: concept, design, content integration, layout, proofing, printing
- b) Clear milestones and deliverables with allocated timeframes
- c) Resources allocated per phase
- d) Expected feedback turnaround time for each review stage

## **5. PROJECT DURATION**

Project must be completed by no later than **31 July 2025**, with drafts ready by **14 July 2025** for AGSA/DHET submission.

## 6. PRICING SCHEDULE

Name of bidder \_\_\_\_\_

RFQ number: \_\_\_\_\_

Closing date \_\_\_\_\_

RFQ shall remain valid for acceptance for a period of **90 days** counted from the closing date.

Bidders to provide further cost breakdown where necessary under each line item, and sub-total and the overall RFQ price (Total) should be included. The below table is for illustration only:

Item	Requirement Description	Quantity	Unit Price (Excl. VAT)	Total Cost (Excl. VAT)
	<b>Appointment of service provider for the conceptualisation, design, layout, editing and printing of the MICT SETA 2024/2025 annual report</b>			
1.	Conceptualisation	1	R	R
2.	Photography and Visual content	1	R	R
3.	Design and Layout	1	R	R
4.	Content Management	1	R	R
5.	Printing and delivery of 400 copies	400	R	R
Sub-Total		R		
VAT@15%		R		
<b>TOTAL PRICE (INCLUDING VAT)</b>		R		

Complete below:

1. Delivery Address: **MICT SETA Head office**  
**Level 3 West wing, Gallagher House**  
**19 Richards Drive, Halfway House**  
**Midrand**

2. Indicate Delivery period after order receipt.....

3. Is delivery period fixed? **Yes/No**

4. Is the price(s) fixed? **Yes/No**

5. Is the quote strictly to specification? **Yes/No**

I/We, the undersigned, agree that this bidding price shall remain binding on me/us and open for acceptance for the period stipulated above.

Authorised Company Representative: \_\_\_\_\_

Capacity under which this quote is signed: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_



## 7. EVALUATION CRITERIA

MICT SETA complies with the provisions of the Public Finance Management Act, Act No. 1 of 1999 as amended; Treasury Regulations of 2005; the Preferential Procurement Policy Framework Act, Act No. 5 of 2000; Preferential Procurement Regulations of 2022; and the MICT SETA Supply Chain Management (SCM) Policy.

RFQs received will be evaluated on functionality/technical criteria and, price and specific goals comparison.

### 7.1. STAGE 1: TECHNICAL/ FUNCTIONALITY CRITERIA

Bids submitted will be evaluated on technical functionality out of a maximum of **100 points**. A threshold of **70** out of the **100** points has been set.

Only bidders that have met or exceeded the qualification threshold on technical functionality of **70** points will qualify for further evaluation on Price and Specific Goals.

Note: All bidders achieving less than the set threshold of 70 points will be declared non-responsive.

Assessment of evaluation of the functional/ technical criteria will be based on the table below:

**Note: Bidders that do not meet the requirements of set functional criteria will be eliminated from further evaluation process.**

FUNCTIONAL CRITERIA			
NO	CATEGORY	FUNCTIONAL EVALUATION CRITERIA	MAXIMUM POINTS
1.	DIGITAL AND HARD COPY SAMPLES	<p>Bidder is required to provide four (04) digital samples (online version) and four (04) hard copy of previous work completed of Annual Reports in a PFMA schedule 3A/3C entities or similar. Samples can be from different clients or same client with four (04) differing projects. <b>[20 points]</b></p> <p><b>The digital samples submitted must be aligned with the hard copy samples provided.</b></p> <p><b>Points on submission of digital and hard copy samples will be allocated as follows:</b></p> <ul style="list-style-type: none"><li>• Submission of four (04) samples (digital &amp; hard copy samples) of an annual report, from different clients or same clients = <b>20 points</b></li><li>• Submission of three (03) samples (digital &amp; hard copy samples) of an annual report, from different clients or same clients = <b>15 points</b></li></ul>	20

		<ul style="list-style-type: none"> <li>• Submission of two (02) samples (digital &amp; hardcopy samples) of an annual report, from different clients or same clients = <b>10 points</b></li> <li>• Submission of one (01) sample (digital &amp; hard copy samples) of an annual report = <b>05 points</b></li> <li>• Non-compliance to minimum requirements = <b>0 points</b></li> </ul> <p><b>Note: For each digital sample submitted, there must be a supporting hardcopy sample.</b></p>	
2.	<b>EXPERIENCE AND TRACK RECORD</b>	<p>The bidder must demonstrate experience in conceptualisation, design, layout, content management, editing and printing of Annual Reports in a PFMA schedule 3A/3C entities schedule 3A/3C entities or similar. Bidder must provide reference letters.</p> <p>The reference letters must be from Bidder's clients within the Republic of South Africa (RSA), must be signed, contactable, on client's letterhead and indicate project description. <b>[15 points]</b></p> <p><b>The reference letters submitted must be aligned to the Samples provided.</b></p> <p><b>Points on submission of reference letters, with experience in Managed Security Services or similar will be allocated as follows:</b></p> <ul style="list-style-type: none"> <li>• Submission of four (04) or more signed reference letters aligned to the samples provided = <b>15 points</b></li> <li>• Submission of three (03) signed reference letters aligned to the samples provided = <b>11 points</b></li> <li>• Submission of two (02) signed reference letters aligned to the samples provided = <b>07 points</b></li> <li>• Submission of one (01) signed reference letter aligned to the samples provided = <b>03 points</b></li> <li>• No reference letters submitted = <b>0 points</b></li> </ul> <p><b>NOTE: The MICT SETA may verify the Reference Letters prior to award.</b></p>	15
3	<b>PROJECT TEAM</b>	<p>Bidder to demonstrate capacity and skills to deliver on project scope. Bidder must provide CV's of Project Team indicated below. CV's should clearly indicate the years of experience in managing or delivering of conceptualisation, design, layout and printing of Annual Reports.</p> <p>Bidders should clearly indicate on the CV's or project team organogram the Project Manager, Designer and Editor.</p>	30

**MICT SETA will not award points for bids not clearly indicating the Project Team.**

**Points on submission of CV of the Project Manager will be allocated as follows:**

- CV submitted highlights five (05) years' experience in managing of conceptualisation, design, layout and printing of Annual Reports = **10 points**
- CV submitted highlights four (04) years' experience in managing of conceptualisation, design, layout and printing of Annual Reports = **08 points**
- CV submitted highlights three (03) years' experience in managing of conceptualisation, design, layout and printing of Annual Reports = **06 points**
- CV submitted highlights two (02) years' experience in managing of conceptualisation, design, layout and printing of Annual Reports = **04 points**
- CV submitted highlights one (01) year experience in managing of conceptualisation, design, layout and printing of Annual Reports = **02 points**
- **Non-compliance with the minimum requirements = 0 points**

**Points on submission of CV of the Designer will be allocated as follows:**

- CV submitted highlights five (05) years or more experience in delivering of conceptualisation, design, layout and printing of Annual Reports = **10 points**
- CV submitted highlights four (04) years' experience in delivering of conceptualisation, design, layout and printing of Annual Reports = **08 points**
- CV submitted highlights three (03) years' experience in delivering of conceptualisation, design, layout and printing of Annual Reports = **06 points**
- CV submitted highlights two (02) years' experience in delivering of conceptualisation, design, layout and printing of Annual Reports = **04 points**
- CV submitted highlights one (01) year experience in delivering of conceptualisation, design, layout and printing of Annual Reports = **02 points**
- **Non-compliance with the minimum requirements = 0 points**

**Points on submission of CV of the Editor will be allocated as follows:**

		<ul style="list-style-type: none"> <li>• CV submitted highlights five (05) years or more experience in delivering of conceptualisation, design, layout and printing of Annual Reports = <b>10 points</b></li> <li>• CV submitted highlights four (04) years' experience in delivering of conceptualisation, design, layout and printing of Annual Reports = <b>08 points</b></li> <li>• CV submitted highlights three (03) years' experience in delivering of conceptualisation, design, layout and printing of Annual Reports = <b>06 points</b></li> <li>• CV submitted highlights two (02) years' experience in delivering of conceptualisation, design, layout and printing of Annual Reports = <b>04 points</b></li> <li>• CV submitted highlights one (01) year experience in delivering of conceptualisation, design, layout and printing of Annual Reports = <b>02 points</b></li> <li>• <b>Non-compliance with the minimum requirements = 0 points</b></li> </ul>	
<b>4</b>	<b>CONCEPT AND THEME RATIONALE</b>	<p>Bidder must provide three (03) proposed design samples of a 4IR concept theme as per outlined scope of work. Designs will be evaluated based on adherence to the prescribed 4IR theme referencing MICT SETA sub-sectors (Advertising, Film and Electronic Media, Electronics, Information Technology, and Telecommunications).</p> <p><b>Points on submission of Design Samples will be allocated as follows:</b></p> <ul style="list-style-type: none"> <li>• Submission of three (03) or more design samples reflecting 4IR and media related theme depicting MICT SETA sub-sectors with rationale = <b>15 points</b></li> <li>• Submission of three (02) design samples reflecting 4IR and media related theme depicting MICT SETA sub-sectors with rationale = <b>10 points</b></li> <li>• Submission of one (01) design samples reflecting 4IR and media related theme depicting MICT SETA sub-sectors with rationale = <b>05 points</b></li> <li>• Submission of design sample(s) not reflecting 4IR and media related theme depicting MICT SETA sub-sectors with rationale = <b>0 points</b></li> <li>• <b>Non-compliance with the minimum requirement = 0 points</b></li> </ul>	<b>15</b>
<b>5.</b>	<b>PROJECT METHODOLOGY AND APPROACH</b>	<p><b>Bidders are required to provide a detailed Project Implementation Methodology, approach, and Project Implementation Plan in executing the project and support services. [20 points]</b></p> <p>The methodology and approach should include the following elements:</p>	<b>20</b>

	<ol style="list-style-type: none"> <li>1. Understanding of the scope and objectives</li> <li>2. Step-by-step approach for: <ol style="list-style-type: none"> <li>a. Conceptualisation</li> <li>b. Theme development and visual planning</li> <li>c. Layout, proofing and feedback cycles</li> <li>d. Content management and version control</li> <li>e. Printing and delivery schedule</li> </ol> </li> <li>3. Risk mitigation plan</li> <li>4. Quality assurance processes</li> <li>5. Proposed communication and sign-off procedures</li> </ol> <p><b>Points on submission of Methodology and Approach will be allocated as follows: [10 points]</b></p> <ul style="list-style-type: none"> <li>• Submission of methodology and approach that meets all five (05) elements = <b>10 points</b></li> <li>• Submission of methodology and approach that meets four (04) elements = <b>08 points</b></li> <li>• Submission of methodology and approach that meets three (03) elements = <b>06 points</b></li> <li>• Submission of methodology and approach that meets two (02) elements = <b>04 points</b></li> <li>• Submission of methodology and approach that meets one (01) element = <b>02 points</b></li> <li>• <b>Non-Compliance to minimum requirements = 0 points</b></li> </ul> <p><b>The Project Plan should clearly indicate the following (but not limited to key processes): [10 points]</b></p> <ol style="list-style-type: none"> <li>1. Timelines for each phase: concept, design, content integration, layout, proofing, printing</li> <li>2. Clear milestones and deliverables with allocated timeframes</li> <li>3. Resources allocated per phase</li> <li>4. Expected feedback turnaround time for each review stage</li> </ol> <p><b>Points on submission of the Project Plan will be allocated as follows:</b></p> <ul style="list-style-type: none"> <li>• Detailed project plan that meets four (04) areas of the project plan = <b>10 Points</b></li> <li>• Detailed project plan that meets three (03) areas of the project plan = <b>07 Points</b></li> <li>• Detailed project plan that meets two (02) areas of the project plan = <b>05 Points</b></li> <li>• Detailed project plan that meets one (01) area of the project plan = <b>05 Points</b></li> </ul>	
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**NB: All elements must be covered in detail.**

<b>TOTAL</b>		<b>100</b>
<b>MINIMUM THRESHOLD</b>		<b>70</b>

**Note to the bidder: Failure to comply with the requirements of the set evaluation criteria will lead to your offer being eliminated from further evaluation process.**

## 7.2. PRICE AND SPECIFIC GOALS

Only bidder/s or RFQ submissions that have met the requirements of technically/functionality evaluation criteria will qualify for further evaluation on Price and Specific Goals according to the 80/20 preference point system in terms of the Preferential Procurement Regulations 2022, where 80 points will be for Price and 20 points will be for Specific Goals. RFQ will be awarded to the bidder scoring the highest points.

Specific Goal to be evaluated out of **20 Points**:

Criteria	Points
Enterprise owned by historically disadvantaged persons.	10
Enterprise owned by historically disadvantaged women.	05
Enterprise owned by historically disadvantaged youth.	05
<b>Total</b>	<b>20</b>

**\*\* Enterprises that are not owned by historically disadvantaged persons will be allocated 0 points.**

**Bidder must submit the following documents:**

- Certified ID copies of the company's directors as per the CIPC documents. (Certified copies must not be older than six (06) months).
- CIPC Documents and/or share certificate (for companies with more than one (01) Director).

**Failure on the part of a service provider to submit proof or documentation required in terms of this RFQ to claim points for specific goals, will be interpreted to mean that preference points for specific goals are not claimed.**

## 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 interest<sup>1</sup> 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

2.1.2. 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:

<sup>1</sup> 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 consortium<sup>2</sup> 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.

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<sup>2</sup> 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.



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 PROCUREMENT CLAIM FORM

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

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

**NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022**

#### 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

- a) The applicable preference point system for this tender is the **80/20** preference point system.
- b) the **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
<b>Total points for Price and SPECIFIC GOALS</b>	<b>100</b>

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:

<b>80/20</b>	<b>or</b>	<b>90/10</b>
$Ps = 80 \left( 1 - \frac{Pt - P_{min}}{P_{min}} \right)$	or	$Ps = 90 \left( 1 - \frac{Pt - P_{min}}{P_{min}} \right)$

**Where:**

Ps = Points scored for price of tender under consideration  
Pt = Price of tender under consideration  
Pmin = Price of lowest acceptable tender

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

#### 3.2.1. POINTS AWARDED FOR PRICE

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

<b>80/20</b>	<b>or</b>	<b>90/10</b>
$Ps = 80 \left( 1 + \frac{Pt - P_{max}}{P_{max}} \right)$	or	$Ps = 90 \left( 1 + \frac{Pt - P_{max}}{P_{max}} \right)$

**Where:**

Ps = Points scored for price of tender under consideration  
 Pt = Price of tender under consideration  
 Pmax = Price of highest acceptable tender

#### 4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
- (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,
- then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

**Table 1: Specific goals for the tender and points claimed are indicated per the table below.**  
**Note to 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 (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Enterprise owned by historically disadvantaged persons.	10	
Enterprise owned by historically disadvantaged women.	05	
Enterprise owned by historically disadvantaged youth.	05	

#### 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.

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**SIGNATURE(S) OF TENDERER(S)**

**SURNAME AND NAME:** .....

**DATE:** .....

**ADDRESS:** .....

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