

REQUEST FOR QUOTATION

Reference No:

You are hereby requested to submit a quotation in respect of goods and services as per **Annexure A**, and/or attached Specification/Terms of Reference.

SUPPLIER DETAILS					
Name of supplier					
Contact person					
Fax number					
Contact number					
BUSINESS CLASSIFICATION					
Turn over (TICK appropriate box below) Please note that this information is compulsory and must therefore be provided. If uncertain use the attached schedule for guidance					
Exempted Micro-Enterprises (EMEs) R0.00 to R10m				Qualifying Small Enterprises (QSE)	Large Company
Small	Micro	Medium	Cooperative	>R10m <R50m	>R50 million
ENQUIRIES AND SUBMISSION DETAILS					
Contact person			Nhlakanipho Msane		
e-mail address			DSBDtenders@dsbd.gov.za		
Telephone number			060 981 0616		
Issue/Request date			10 July 2026		
Closing date and time			17 July 2026 @ 11H00		
Terms and Conditions					
#	REQUIREMENTS				COMMENTS
1	Quotations should be dated.				
2	Quotations should be valid for 30 days unless indicated otherwise.				
3	Does it comply with cost containment (Yes or No)				
3	All prices quoted must be VAT inclusive, if no indication is indicated prices will be evaluated as inclusive.				
4	Should you not be registered for VAT it should be clearly indicated on the quotation.				
5	Please indicate the delivery period and confirm whether the delivery period is firm.				
6	Please indicate whether the prices quoted are firm for the duration of the validity period of the quotation.				
7	Please indicate whether the quotation is strictly to specification and if not state deviations and reasons for deviating from the requested specifications.				
8	This quotation is subject to the Department of Small Business Development's general conditions of contract unless otherwise stated by the supplier.				
9	Quotations should be on the service provider's letter head.				
10	Failure to submit quotation on the closing date and time with all supporting documents MAY invalidate your quotation				

Please note: Quotations with an amount value of R2 000.00 and above but not exceeding R999 999.99 80/20 preference point system shall be applied where 80 points will be allocated towards price and 20 points allocated towards specific goals, Size of Enterprise, Spatial (rural/ Township/ City) and Youth.

ANNEXURE A

REQUIREMENTS LIST			
Item No	No of units	Item description	Value per item
1	1	Request for quotation for a suitably qualified, knowledgeable, and experienced service provider to provide full and professional editing, design, layout, and printing services for the Department's 2025/26 Annual Report, 2027/28 Annual Performance Plan and where applicable the review of the 2025-30 Strategic Plan. The following services would be required of the service provider: • Professional editing. • Design and layout. • Electronic submission of each document – pdf, fully editable version. • Printing (10 hard copies of each document). The service provider will be provided with the approved Department's 2025/26 Annual Report, 2027/28 Annual Performance Plan as well as the reviewed 2025-30 Strategic Plan (where applicable). The service provider will be required to professionally design, format and organise the content of these documents in accordance with the prescribed templates, branding requirements and themes communicated by the Department.	
Compulsory documents to be returned.		(a) Fully completed Standard Bidding Documents; SBD 4 and 6.1 (b) Points for tender shall be awarded for Price and B-BBEE, SMMEs, Spatial (rural/ Township/ City) and Youth. To claim points following should be provided. i. For B-BBEE require a Certified copy of BEE Certificate/or Affidavit, ii. A Confirmation of SMMEs, take note of the above table (business classification) iii. For Spatial (Rural/ Township/ City) a Certified copy of your proof of residence 6 months	

SCHEDULE 1

The new National Small Enterprise Act thresholds for defining enterprise size classes by sector, using two proxies

Column 1	Column 2	Column 3	Column 4
Sectors or sub-sectors in accordance with the Standard Industrial	Size or class of enterprise	Total full-time equivalent of paid employees	Total annual turnover
Agriculture	Medium	51 - 250	≤ 35,0 million
	Small	11- 50	≤ 17,0 million
	Micro	0 – 10	≤ 7,0 million
Mining and Quarrying	Medium	51 - 250	≤ 210,0 million
	Small	11- 50	≤ 50,0 million
	Micro	0 – 10	≤ 15,0 million
Manufacturing	Medium	51 - 250	≤ 170,0 million
	Small	11- 50	≤ 50,0 million
	Micro	0 – 10	≤ 10,0 million
Electricity, Gas and Water	Medium	51 - 250	≤ 180,0 million
	Small	11- 50	≤ 60,0 million
	Micro	0- 10	≤ 10,0 million
Construction	Medium	51 - 250	≤ 170,0 million
	Small	11- 50	≤ 75,0 million
	Micro	0- 10	≤ 10,0 million
Retail, motor trade and repair services.	Medium	51 - 250	≤ 80,0 million
	Small	11- 50	≤ 25,0 million
	Micro	0 – 10	≤ 7,5 million
Wholesale	Medium	51 - 250	≤ 220,0 million
	Small	11- 50	≤ 80,0 million
	Micro	0 – 10	≤ 20,0 million
Catering, Accommodation and other Trade	Medium	51 - 250	≤ 40,0 million
	Small	11- 50	≤ 15,0 million
	Micro	0 – 10	≤ 5,0 million
Transport, Storage and Communications	Medium	51 - 250	≤ 140,0 million
	Small	11- 50	≤ 45,0 million
	Micro	0 – 10	≤ 7,5 million
Finance and Business Services	Medium	51 - 250	≤ 85,0 million
	Small	11- 50	≤ 35,0 million
	Micro	0- 10	≤ 7,5 million
	Medium	51 - 250	≤ 70,0 million

Community, Social and Personal Services	Small	11- 50	≤ 22,0 million
	Micro	0 – 10	≤ 5,0 million



**small business
development**

Department:
Small Business Development
REPUBLIC OF SOUTH AFRICA

REQUEST FOR QUOTATION (RFQ) FOR FULL AND PROFESSIONAL EDITING, DESIGN, LAYOUT AND PRINTING OF THE 2025/26 ANNUAL REPORT, 2027/28 ANNUAL PERFORMANCE PLAN AND WHERE APPLICABLE REVIEW OF THE 2025-2030 STRATEGIC PLAN

DATE OF ISSUE : 10 JULY 2026
CLOSING DATE AND TIME : 17 JULY 2026
CLOSING TIME : 11:00
Email : DSBDtenders@dsbd.gov.za

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1. OBJECTIVES

The objective of this request for quotation is to appoint a suitably qualified, knowledgeable, and experienced service provider to provide full and professional editing, design, layout, and printing services for the Department's 2025/26 Annual Report, 2027/28 Annual Performance Plan and where applicable the review of the 2025-30 Strategic Plan.

1.1. The following services would be required of the service provider:

- Professional editing.
- Design and layout.
- Electronic submission of each document – pdf, fully editable version.
- Printing (10 hard copies of each document).

2. SCOPE OF WORK

2.1. The service provider will be provided with the approved Department's 2025/26 Annual Report, 2027/28 Annual Performance Plan as well as the reviewed 2025-30 Strategic Plan (where applicable). The service provider will be required to professionally design, format and organise the content of these documents in accordance with the prescribed templates, branding requirements and themes communicated by the Department.

2.2. The design specification must comply with the DSBD corporate identity (CI) guidelines. The DSBD will provide the successful service provider with the approved Corporate Identity specifications, including requirements relating to corporate colours, fonts, size, paper quality, photographs, images and other branding elements to be applied. The successful service provider will be required to develop and submit a minimum of three mock-ups for each document for the Department's review and approval prior to finalisation.

2.3. The service provider will also be required to propose and/or provide, at no additional cost to the Department, suitable high-resolution photographs and images for inclusion in the Annual Report, Annual Performance Plan, and the Strategic Plan (where applicable). All images must be of professional quality, copyright compliant, and aligned with the Department's CI guidelines and communication requirements.

2.4. The service provider will be required to adhere to the following **Production** timeframes:

2.4.1. Timeframes for the Annual Report.

2.4.1.1. The Department will provide the service provider with an audited Annual Report.

2.4.1.2. The first edited and designed version of the Annual Report must be submitted within three (3) calendar days from the date of receipt of the document.

2.4.1.3. The DSBD will provide the service provider with comments, amendments and additional inputs for subsequent revisions and follow-on.

- 2.4.1.4.** Each subsequent revised version must be submitted within two (2) calendar days from the date on which the service provider receives the Department's comments and inputs.

The last printer's proof and the final printed copies will be as per the agreed timelines.

2.4.2. Timeframes for the Annual Performance Plan.

- 2.4.2.1.** The Department will provide the service provider with the draft APP.
- 2.4.2.2.** The first edited and designed version of the APP must be submitted within three (3) calendar days from the date of receipt of the document.
- 2.4.2.3.** The DSBD will provide the service provider with comments, amendments, and additional inputs for subsequent revisions.
- 2.4.2.4.** Each subsequent revised version must be submitted within two (2) calendar days from the date on which the service provider receives the Department's comments and inputs.
- 2.4.2.5.** The final printer's proof and the printed copies must be submitted in accordance with the production schedule, and timelines agreed upon with the Department.

2.4.3. Timeframes for the reviewed 2025-2030 Strategic Plan (where applicable).

- 2.4.3.1.** The Department will provide the service provider with the reviewed Strategic Plan (where applicable).
- 2.4.3.2.** The first edited and designed version of the reviewed Strategic Plan must be submitted within three (3) calendar days from the date of receipt of the document.
- 2.4.3.3.** The DSBD will provide the service provider with comments, amendments, and additional inputs for subsequent revisions.
- 2.4.3.4.** Each subsequent revised version must be submitted within two (2) calendar days from the date on which the service provider receives the Department's comments and inputs.
- 2.4.3.5.** The final printer's proof and the printed copies must be submitted in accordance with the production schedule, and timelines agreed upon with the Department.

2.5. Design Specifications

- 2.5.1.** Design, layout, editing, formatting and printing will be undertaken only on documents that have been edited and approved by DSBD.

2.5.2. Publication Specification

- 2.5.2.1. Page Format:** A4 page size (Portrait, Landscape, or a combination of both formats, as determined by the Department).

2.5.2.2. Estimated Number of pages and Print Quantities

- a. Annual Report – Maximum of approximately 230 pages per edited and designed document.
- b. Annual Performance Plan – Maximum of approximately 140 pages per edited and designed document.
Maximum of approximately 120 pages per edited and designed document.
- c. **Print Quantity:** Approximately 10 copies of each document, subject to Parliament's determination of final printing requirements.

2.5.2.3. Paper and Binding specifications

- 2.5.2.3.1.** Paper: 128 gsm
- 2.5.2.3.2.** Cover Board: Matt, 300 gsm
- 2.5.2.3.3.** Binding: Perfect Binding
- 2.5.2.3.4.** Colour: Full Colour
- 2.5.2.3.5.** Finishing: Matt lamination, deep spot UV varnish

2.5.3. Memory Stick

- 2.5.3.1.** The service provider will produce and supply **one (1) branded and labelled memory stick** with the final delivery of each publication. Each memory stick must be appropriately labelled to identify the relevant publication.
- 2.5.3.2.** The memory stick must contain the final approved publication in:
- 2.5.3.3.** Fully editable source files (e.g. Adobe InDesign package, linked artwork and fonts where applicable); and
- 2.5.3.4.** High-resolution print-ready PDF and standard PDF versions suitable for electronic distribution.

3. DSB'S ROLES AND RESPONSIBILITIES

- 3.1.** Serve as the primary point of contact and communicate with the appointed service provider regarding all instructions, approval, and logistical arrangements through e-mails and telephonic communication, where necessary.
- 3.2.** Provide the service provider with all applicable guidelines, templates, branding requirements, and specifications for development, design, editing and production of the documents.
- 3.3.** Provide the approved content for the Annual Report, APP and Strategic Plan (where applicable).
- 3.4.** Provide official photographs of the Minister, Deputy Minister, Director-General and any officials approved for inclusion in the publications.
- 3.5.** Provide additional photographs and images for inclusion in the publications, where required, to complement those proposed or supplied by the service provider.
- 3.6.** Review and approve the proposed design concepts, page layouts, copywriting, artwork, and overall design of the publications before final production.
- 3.7.** Review and approve all editing, formatting, proofreading, and amendments undertaken by the service provider prior to printing and final publication.
- 3.8.** Review and approve all printer's proofs before authorising the printing and final production of the publications.
- 3.9.** Monitor the service provider's performance to ensure compliance with the agreed quality standards, deliverables, and production timeframes.

4. EVALUATION OF THE PROPOSAL

4.1 PHASE 1: PRELIMINARY EVALUATION (COMPLIANCE EVALUATION)

- 4.1.1** During this phase, bid documents will be reviewed to determine compliance with Supply Chain Management documents.

4.1.2 The bid proposal will be screened for compliance with administrative requirements as indicated below:

ITEM NO.	ADMINISTRATIVE REQUIREMENTS	CHECK/ COMPLIANCE
1.	CSD Registration	Attached CSD registration report.
2.	SCM - SBD 4 – Bidders Disclosure	Completed and signed
3.	SCM - SBD 6.1 - Preference Points Claim Form in terms of the Preferential Procurement Regulations 2022	Completed and signed
4.	In case of bids where Consortia / Joint Ventures, Consortia/ Joint Venture agreements signed by both parties must be submitted with bid proposal	JV agreement completed and signed, if applicable

4.2 PHASE 2: MANDATORY REQUIREMENTS

4.2.1 Bidders are required to complete below table by indicating whether they comply with the mandatory requirements by marking the appropriate column with an 'X'. Bidders are required to attach documentation.

4.2.2 Failure to submit any of the required documents or to comply with these requirements will render the bid non-responsive and will result in disqualification from further evaluation.

4.2.3 Bidders that have complied with all mandatory requirements will move to phase 3: Price and Specific Goals.

PROPOSAL CHECKLIST

	Proposal checklist	YES	NO
1.	References/Track record For the purpose of this request, the service provider must provide at least four (4+) electronic samples (full documents) each of Annual Reports, Strategic Plans and Annual Performance Plans previously edited, proof-read, designed, and had done its layout.		
2.	Experience/Track Record For the purpose of this request the Service Provider must have a minimum of five (5) years' experience in producing Annual Reports, Strategic Plans and Annual Performance Plans of government departments. (In addition to demonstrating the experience, proposals must include proof of delivering similar services i.e., provide four (4+) contactable references		

	Proposal checklist	YES	NO
	of four successfully completed projects – Please provide name of the Department, project completed, contact name and number). The service provider must submit a minimum of four (4+) signed, dated reference letters from clients for editing, proof-reading, layout designing of Strategies, Annual Performance Plans or Annual Reports for government/corporate organisations of services rendered within the last five (5) years. Each reference letter must: • Be on the client's official letterhead. • Be signed and dated. • Include contactable details (i.e. telephone number, and email address) • Confirm the nature, duration and dates of when services were rendered. Note: The Department reserves the right to verify the authenticity of the information provided.		
3.	Qualification and Experience of Project Leader and Team Members. Provide details of experience and expertise of the Project Leader and Team Members in relation to the Request for Proposal. The CV of the project leader and team members should indicate the number of years producing Annual Reports, Strategic Plans and Annual Performance Plans of government departments. The process of delivery of this project: whether the service provider has internal capacity or will outsource some of the project deliverables to other service providers. If there will be outsourcing, the same documentation that details experience and expertise should be provided. Attach CVs of the below-mentioned key personnel: a) Project Leader: Must have a minimum qualification of NQF level 7 or higher in Bachelor of Arts/ Social Sciences majoring in Communication/Journalism/Graphic Design/English/Creative Writing or studies related to professional writing as recognised by the South African Qualifications Authority (SAQA) and must have a minimum of 5 years' experience in editing, proof-reading, layout designing of policies and strategies of the government/corporate with 3 contactable references. b) Minimum of (2+) Team Members: Must have a minimum qualification of NQF level 6 in a form of a Diploma or higher in Communication/Journalism/Graphic Design/English/Creative Writing or studies related to professional writing as recognised by the South African Qualifications Authority (SAQA) and must have minimum of 2 years' experience in in editing, proof-reading, layout designing of policies and strategies of the government/corporate with 3 contactable references.		

	Proposal checklist	YES	NO
	Note: The Department reserves the right to verify the authenticity of the information provided.		
4.	Project Implementation Plan Service provider to provide a fully detailed project implementation plan, aligned to the time frames and standards of the project. Given the nature of this work and the approval processes embedded in it, the service provider must be willing to accommodate requests that come in outside office hours, including during weekends, and for the work or delivery not to be limited to during office hours / weekdays only.		

Note: All bidders who do not comply with the criteria above will be disqualified for further evaluation.

5. PHASE 3: Price and Specific Goals

The bid price must be inclusive of VAT and quoted in RSA currency.

	80/20 PRINCIPLE	POINTS
1	PRICE	80
2	SPECIFIC GOALS STATUS LEVEL OF CONTRIBUTION	20
	MAXIMUM POINTS	100

Only qualifying quotations will be evaluated for 80/20 preference points, in terms of the preference point system described in the PPPFA.

Preference Points

The 80/20 Preference points system will be applied using the formula below to calculate the price:

The following formula will be used to calculate the points for price: Criteria	Points
Price Evaluation $Ps = 80 \left(1 - \frac{Pt - Pmin}{Pmin} \right)$	80

Where,

Ps = Points scored for the comparative price of a bid under consideration
 Pt = Comparative price of a bid under consideration
 Pmin = Comparative price of lowest acceptable bid

In terms of Regulations 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points will be awarded to a bidder for attaining the Specific goals status level of contribution by the table as set out in the Preference Points Claim Form (SBD 6.1).

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)
OWNERSHIP	2 Level 1 = 2 pts Level 2 = 1,75 pts Level 3 = 1,5 pts Level 4 = 1,25 pts Level 5 = 1 pts Level 6 = 0,75 pts Level 7 = 0,5 pts Level 8 = 0,25 pts Non-compliant contributor= 0	
Size of Enterprise (SMMES): MICRO, SMALL, MEDIUM ENTERPRISES	8 Micro = 8 Small = 5,6 Medium = 3,2 Large = 0,8	
Spatial (Rural/ Township/ City)	4 Rural = 4 Township = 2,4 City = 0,8	
Youth and non-youth	6	

In responding to this request, the service provider needs to provide:

- SCM documents – SBD 4, SBD 6.1 forms and CSD information
- Items listed in the checklists below:

6. ENQUIRIES

Below is the contact details for all bid-related enquiries.

QUERY	NAME	CONTACT DETAILS
Technical	Mr. N Ratshisindi	Nratshisindi@dsbd.gov.za 066 472 3782
	Ms. B Kubheka	Bkubheka@dsbd.gov.za 072 266 8611

	Ms. N Zulu	Nfzulu@dsbd.gov.za 079 510 7357
Bids Responses and Bid Related Enquiries	Mr. Nhlakanipho Msane, Mr. Conty Mokala Ms. Rudzani Matodzi and Ms. Jane Kekana	DSBDtenders@dsbd.gov.za 012 394 3014

Please note this checklist must be completed and submitted together with the **Proposal**

Document that must be submitted	Provided (Yes/No) <i>Non-submission may result in disqualification</i>	
Declaration of Interest – SBD 4	YES/NO	Complete and sign the supplied pro forma document
Preference Point Claim Form – SBD 6.1	YES/NO	Non-declaration and non-submission of the Sworn Affidavit and a valid BEE Certificate issued by a SANAS Accredited supplier will lead to a zero (0) score on BBBEE
Registration on Central Supplier Database (CSD)	YES/NO	The Service Provider must be registered on the CSD. If you are not registered proceed to complete the registration of your company prior to submitting your proposal. Visit https://secure.csd.gov.za/ to obtain your vendor number. Submit proof of registration.
Functional Proposal including Mandatory documents	YES/NO	Submit a functional proposal in line with the Terms of Reference including the SBD documents above.
Pricing Schedule	YES/NO	Submit full details of the pricing proposal

ToR Approved

YES



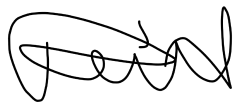
NO



Mr. Nthuseni Ratshisindi

Acting Chief Director: Strategy and Governance

Date: 09 July 2026



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

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.

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.
- 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

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.

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

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
OWNERSHIP	2
SIZE OF ENTERPRISE (SMMES): MICRO, SMALL, MEDIUM ENTERPRISES	8
SPATIAL (RURAL/ TOWNSHIP/ CITY)	4

YOUTH AND NON-YOUTH	6
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:

$$P_s = 80 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right) \text{ or } P_s = 90 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right)$$

Where

- P_s = Points scored for price of tender under consideration
- P_t = Price of tender under consideration
- P_{min} = 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:

$$\begin{array}{ccc} \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\ \mathbf{Ps = 80 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)} & \mathbf{or} & \mathbf{Ps = 90 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)} \end{array}$$

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)
OWNERSHIP	1	2		
	Level 1 = 1 pts Level 2 = 0,125pts Level 3 = 0 pts Level 4 = 0 pts Level 5 = 0 pts Level 6 = 0 pts Level 7 = 0 pts Level 8 = 0 pts Non-compliant contributor= 0	Level 1 = 2 pts Level 2 = 1,75 pts Level 3 = 1,5 pts Level 4 = 1,25 pts Level 5 = 1 pts Level 6 = 0,75 pts Level 7 = 0,5 pts Level 8 = 0,25 pts Non-compliant contributor= 0		
Size of Enterprise (SMMES): MICRO, SMALL, MEDIUM ENTERPRISES	4	8		
	Micro = 4 Small = 3,6 Medium = 2 Large = 1,6	Micro = 8 Small = 5,6 Medium = 3,2 Large = 0,8		
Spatial (Rural/ Township/ City)	2	4		
	Rural = 2 Township = 1,2 City = 0,4	Rural = 4 Township = 2,4 City = 0,8		
Youth and Non-Youth	3	6		
	Youth = 3 None-Youth = 0,9	Youth = 6 None-Youth = 1,8		

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: