



4th Floor
Riverwalk Office Park
Block A, 41 Matroosberg Road
Ashlea Gardens
PRETORIA
SOUTH AFRICA
0081
P.O. Box 580, MENLYN, 0063
Tel: 012 346 1738, **Fax:** 086 693 7472
E-Mail: tenders@pfa.org.za
Website: www.pfa.org.za

BID DESCRIPTION	PROVISION OF PUBLIC RELATION (PR) AND COMMUNICATION SERVICES FOR A PERIOD OF 36 MONTHS
BID NUMBER	OPFA/PR/062024
CLOSING DATE	06 FEBRUARY 2025
CLOSING TIME	11:00

Bidder name: _____

Company registration number: _____

CSD number: _____



4th Floor
Riverwalk Office Park
Block A, 41 Matroosberg Road
Ashlea Gardens, Extension 6
PRETORIA
SOUTH AFRICA
0181

P.O. Box 580, **MENLYN**, 0063
Tel: 012 346 1738 / 748 4000
Fax: 086 693 7472
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1. INTRODUCTION

- 1.1. The Office of the Pension Funds Adjudicator (OPFA) was established in terms of section 30B of the Pension Funds Act No.24 of 1956 ("Act") with effect from 01 January 1998 and is funded in terms of section 30R of the Act.
- 1.2. In terms of section 30D of the Act, the main objective of the Adjudicator is to dispose of complaints lodged in terms of section 30A (3) of the Act, and complaints for which the Adjudicator is designated in terms of section 211 of the Financial Sector Regulation Act.

2. OBJECTIVE OF THE REQUIRED SERVICES

- 2.1. The purpose of this bid is to solicit proposals from suitable and qualified bidders for the appointment of a Public Relations (PR) and Communication services for a period of 36 months effective from 1 April 2025 to manage and enhance the overall image of the OPFA, build key relationships with stakeholders and facilitate effective communication when required.

3. SCOPE OF SERVICES

- 3.1. The scope of the required services is to provide Public Relations, Communication and Professional services as follows:

3.1.1. Public Relations Services

- 3.1.1.1. Writing and distributing of articles and press releases of determinations to community, regional, national and electronic media companies.
- 3.1.1.2. Review and provide editing and proofreading of documents including the Integrated Annual Report.

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- 3.1.1.3. Develop a crisis management plan and strategies to help the organisation to minimise reputational damage and manage a crisis that may arise.
- 3.1.1.4. Craft key messages that resonate with OPFA target audiences and are consistent across all communications.
- 3.1.1.5. Develop key content for print, video, digital, internal and external communication platforms when required (conceptualisation, research, editing and proofreading).
- 3.1.1.6. Integrate Search Engine Optimisation (SEO) tactics into PR content to improve online visibility.
- 3.1.1.7. Organise press briefings and develop press kits that include OPFA mandate, selected information, and identified photographs of executive members.
- 3.1.1.8. Continuous scanning and tracking of media environment for possible opportunities or hostile issues and report back how the organisation is perceived.

3.1.2. Media Relations, Monitoring and Reporting

- 3.1.2.1. Build and maintain relationships with journalists and media companies.
- 3.1.2.2. Coordinating media interviews for the OPFA (radio, television, print and online media).
- 3.1.2.3. Subscription to Media List, Newsclip and Hootsuite.
- 3.1.2.4. Provide training to Managers and relevant OPFA staff annually on how to handle the media.
- 3.1.2.5. Submit monthly media analysis report with evidence of published articles, newspaper clippings, radio and TV recordings on Newsclip.

3.1.3. Other Ad hoc Professional Services

- 3.1.3.1. Create branded videos, video clips, and other multimedia content for campaigns when required.
- 3.1.3.2. Provide graphic design services, social media campaigns and photographic services when required.
- 3.1.3.3. Provide printing services of miscellaneous items when required.
- 3.1.3.4. Assist with corporate and promotional items when required.
- 3.1.3.5. Other related PR and communications services

A provision of the fees is included in the pricing schedule and will be disbursed as when used.

3.1.4. Media Buying and Placement

- 3.1.4.1. Provide media buying and placement services for publications, advertorials, radio and online campaigns.
- 3.1.4.2. Secure bookings space for mall activations quarterly.
- 3.1.4.3. Provide strategic advice to the OPFA on media related issues.

4. PRICING SCHEDULE

4.1. Public Relations Services

Description	Ref to Scope	Unit	Duration	Rate	Total excl. VAT
Writing and distributing press releases	3.1.1.1	Monthly retainer	36 months		
SEO integration for PR content	3.1.1.6				
Building and maintaining media relationships	3.1.2.1				
Coordinating media interviews	3.1.2.2				
Media tracking and reporting	3.1.2.5				
Reviewing, editing, and proofreading documents	3.1.1.2				
Develop and distribute press kits	3.1.1.7				
Organising press briefings	3.1.1.7	Per briefing	2 per annum		
Developing crisis management plan and strategies to be approved by the OPFA management	3.1.1.3	Per plan	Once-Off		
Content development	3.1.1.5	Per briefing	Quarterly		
TOTAL (Part A)					

4.2. Media Relations, Monitoring and Reporting

Description	Ref to Scope	Unit	Duration	Rate	Total excl. VAT
Media List Subscription	3.1.2.3	Annually	36 months		
Newsclip Subscription	3.1.2.3	Annually	36 months		
Hootsuite Subscription	3.1.2.3	Annually	36 months		
Media training for staff	3.1.2.4	Per session	Bi-annually (2x per annum) for 3 years		
TOTAL (Part B)					

4.3. Ad-hoc Services

Description	Ref to Scope	Unit	Duration	Hourly Rate	Total excl. VAT
Develop multimedia content (animations, videos, clips, etc.) (Max 8hrs)	2.1.4.1	As per content	Bi-annually		
Graphic design and photography (Max 8hrs)	2.1.4.2	As per project	Bi-annually		
Other Costs (if applicable)					
TOTAL (Part C)					
Grand Total (Part A+B+C)					
VAT					
Grand Total Bid Price					
Offer price in words					

4.4. Media Buying and Placement

Description	Ref to Scope	Unit	Duration	Rate	Total excl. VAT
Print Media	3.1.3.1	As per campaign			
Online Media	3.1.4.1	As per campaign			
Broadcast Media	3.1.4.1	As per campaign			
Mall activation bookings	3.1.4.2	As per activation			
Corporate and Promotional and items	3.1.3.4	As per item			

- The bidder must indicate the handling fee of activities above, the cost of specific activities will be transferred to the OPFA at cost.

5. BID EVALUTION

5.1. Evaluation stage one: Mandatory requirement

ACCREDITATION WITH RELEVANT)	COMPLY	DO NOT COMPLY
The Director of the Company must be registered with PRISA or any other relevant Communication Association or Body		

5.2. Compliance with administrative requirements

Document that must be submitted	Non-submission may result in disqualification	
Master Bid Document	Yes	Provided and bound
Electronic copy (USB /compact disc)	Yes	Same as the master bid document
Invitation to Bid – SBD 1	Yes	Duly completed and signed
CSD Registration	Yes	CSD registration number/Proof of CSD registration. 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.
Pricing schedule	Yes	Duly completed.
SBD 4- Bidders Disclosure	Yes	Duly completed and signed.
SBD 6.1 Preference points claim form in terms of Preferential Procurement Regulation 2022	No	Duly completed and signed. Non-submission will lead to a zero (0) score for preference points
Adherence to closing date and time	Yes	Submission by the due date and time.
Confirmation of the Bidder's contribution to Pension/Provident Fund	No	Proof of contribution or sworn affidavit must be provided

5.3. Evaluation stage two: functionality evaluation criteria

5.3.1 Bidders are expected to obtain a minimum of seventy **(70)** out of hundred points available to proceed to the next evaluation for price and preference stage. Failure to obtain the prescribed points will automatically disqualify the bid offer from proceeding to the next evaluation stage.

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

1.	Bidders Experience	20%									
	i. The bidder must have experience of rendering similar kinds of services and provide contactable reference letters from previous clients where similar services have been successfully provided in the last five (5) years in the letterhead of the company where the services were provided indicating the type of services provided. The reference letter must be signed and dated by the client. ii. The bidder must provide the information in the format below and NO points will be allocated if the table below is not supported by reference letters from the client. <table border="1"> <thead> <tr> <th>Client or Company Name</th><th>Description of services rendered</th><th>Contact details (i.e person, email, numbers etc)</th><th>Period when services was provided</th></tr> </thead> <tbody> <tr> <td></td><td></td><td></td><td></td></tr> </tbody> </table>	Client or Company Name	Description of services rendered	Contact details (i.e person, email, numbers etc)	Period when services was provided					1.	No information provided
		Client or Company Name	Description of services rendered	Contact details (i.e person, email, numbers etc)	Period when services was provided						
		2.	One to two relevant letters experience								
		3.	Three relevant letters experience								
	4.	Four relevant letters experience									
	5.	Five and above relevant letters experience									
	The bidder declares that all relevant parts of the bid response required to answer this question has been correctly referenced below.		YES	NO							
	Reference to schedule(s), Section(s), Page number(s)										
	Proof of evidence required		Bidders must submit signed reference letters in the letterhead of the recommending entity.								

2.	Technical Proposal			40%	
	i. The bidder must provide a detailed methodology that will be followed/applied in providing services required. (refer to scope of services required par. 3) ii. The proposal must outline in detail how the service provider proposes to undertake the services including tools and subscription reports. iii. Demonstrate experience in design and implementation of communication, PR and crisis plans and strategies	1.	No information provided		
		2.	The proposal does not meet all requirements		
		3.	The proposal moderately meets all requirements		
		4.	The proposal adequately meets all requirements		
		5.	The proposal exceeds/ meet all requirements		
	The bidder declares that all relevant parts of the bid response required to answer this question has been correctly referenced below.	YES	NO		
	Reference to schedule(s), Section(s), Page number(s)				
	Proof of evidence required	Bidders must submit a technical proposal outlining how they will meet the OPFA service requirements.			
3.	Project Team Experience			40%	
	i. The bidder must provide information on the availability of relevant key personnel to execute the project. ii. Submit the profile of the project leader demonstrating appropriate experience in dealing with PR and communications and similar/related roles. iii. The bidder must provide a comprehensive Curriculum Vitae (CV) of the key personnel detailing the appropriate experience and qualifications.	1.	No information provided		
		2.	One to two years' experience		
		3.	Three years' experience		
		4.	Four years' experience		
		5.	Five years and above experience		
	The bidder declares that all relevant parts of the bid response required to answer this question has been correctly referenced below.	YES	NO		
	Reference to schedule(s), Section(s), Page number(s)				
	Proof of evidence required	Bidders must submit Profile and CV of key personnel			

5.4. Evaluation stage three: price and preference point system

- 5.4.1. Only Bidders that have met and exceeded the 70-points threshold in stage 2 will be evaluated in stage 3 for price and preference points.
- 5.4.2. The 80/20 preference point system shall be applicable to this bid, where 80 points represent maximum obtainable points for the lowest acceptable price, and 20 points represents the specific goals. Points will be awarded to a bidder for attaining the specific goals outlined in accordance with the table below:

#	Specific Goals of Preference	Proof/ Evidence required	Points Allocation
1	51% or more ownership by black people	CSD report/B-BBEE Certificate or Sworn Affidavit, CIPC Report	5
2	51% or more ownership by black women	CSD report/B-BBEE Certificate or Sworn Affidavit, CIPC Report	5
3	30% or more ownership by people living with disabilities	CSD report/B-BBEE Certificate or Sworn Affidavit, CIPC Report	3
4	30% or more ownership by youth	CSD report/B-BBEE Certificate or Sworn Affidavit, CIPC Report	2
5	EME/QSE	CSD report/B-BBEE Certificate or Sworn Affidavit, CIPC Report	5
TOTAL POINTS			20

6. SPECIAL CONDITIONS

6.1. The following are the special conditions applicable to this request for proposals. The OPFA will not accept the bid if the OPFA is satisfied that any person (including an employee, partner, director or shareholder of the tenderer or a person acting on behalf of or with the knowledge of the tenderer), firm or company:

- 6.1.1 Is executing a contract with the OPFA unsatisfactorily.
- 6.1.2 Is restricted from doing business with the state or employed by the state
- 6.1.3 Has in any manner been involved in a corrupt act in relation or other gift or remuneration to any officer or employee of the OPFA in connection with obtaining or executing a contract.
- 6.1.4 Has acted in bad faith, in a fraudulent manner or committed an offence in obtaining or executing a contract.
- 6.1.5 Has in any manner influenced or attempted to influence the awarding of OPFA's bid;
- 6.1.6 Has, when advised that their tender has been accepted, given notice of his inability to execute or sign the contract.
- 6.1.7 Has engaged in any anti-competitive behaviour, including having entered into any agreement or arrangement, whether legally binding or not, with any other person, firm or company to refrain from tendering for this contract, or relating to the tender price to be submitted by either party.
- 6.1.8 Has disclosed to any other person, any information relating to this bid, except where disclosure, in confidence, was necessary to obtain quotations required for the preparation of the tender or required by law;
- 6.1.9 The OPFA may, in addition to any other legal recourse which it may have, cancel the contract between the OPFA and such a person and/or resolve that no tender from such a person will be considered for a specified period.
- 6.1.10 The award of this tender may be subjected to price negotiation with the highest point scorer in terms of the preferential procurement regulation if the price offered is considered not to be market related.

- 6.2. The OPFA may amend any bid conditions, bid validity period, tender specifications, or extend the bid's closing date, all before the bid closing date. All bidders, to whom the tender documents have been issued and where the OPFA have record of such bidders, may be advised in writing of such amendments in good time and any such changes will also be posted on the OPFA's website under the relevant tender information. All prospective bidders must, therefore, ensure that they visit the website regularly and before they submit their bid response to ensure that they are kept updated on any amendments in this regard.
- 6.3. The OPFA reserves the right not to accept the lowest priced bid or any bid in part or in whole. The OPFA reserves the right to award this bid as a whole or in part.
- 6.4. The OPFA reserves the right to conduct site visits at bidder's corporate offices and/or at client sites if so required.
- 6.5. The OPFA reserves the right to request all relevant information, agreements and other documents to verify information supplied in the bid response. The bidder hereby gives consent to the OPFA to conduct background checks on the bidding entity and any of its directors/trustees/shareholders/members.

7. UNDERTAKING BY THE BIDDER

- 7.1. By submitting a bid in response to this tender, the bidder will be taken to have offered to render all or any of the services described in the bid response submitted by it to the OPFA on the terms and conditions and in accordance with the specifications stipulated in this tender document.
- 7.2. The bidder agrees that the offer contained in its bid shall remain binding and receptive for acceptance by the OPFA during the bid validity period indicated in the tender and calculated from the bid closing date and its acceptance shall be subject to the terms and conditions contained in this tender document read with the bid.
- 7.3. The bidder furthermore confirms that he has satisfied himself as to the correctness and validity of its bid response; that the price(s) and rate(s) quoted cover all the work/item(s) specified in the bid response documents.
- 7.4. The bidder must be able to provide fast turnaround times.

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- 7.5. The successful bidder accepts full responsibility for the proper execution and fulfilment of all obligations and conditions devolving under the supply agreement and Service Level Agreement (SLA) to be concluded with OPFA, as the principal(s) liable for the due fulfilment of such contract.
- 7.6. The bidder accepts that all costs incurred in the preparation, presentation and demonstration of the solution offered shall be for the account of the bidder. All supporting documentation and manuals submitted with the bid will become OPFA property unless otherwise stated by the bidder/s at the time of submission.

8. ENQUIRIES REGARDING TENDER

- 8.1. Any questions regarding this tender shall be submitted in writing to the official mentioned in the Tender Notice, enquiries must be sent to tenders@pfa.org.za

9. TENDER BRIEFING

- 9.1. There will be no tender briefing on this project; for any enquiries/clarity bidders must send enquiries to the designated mail by not later than **27 January 2025** to allow the OPFA opportunity to respond to enquiries. Enquiries received after this date will not be responded to.

10. TENDER SUBMISSIONS

- 10.1. Completed documents with supporting annexures shall be packaged, sealed, clearly marked, and submitted on or before the closing date and time.
- Closing date:** 06 February 2025
- Time:** 11H00
- Tender No:** OPFA/PR/062024

10.2. Bids must be hand delivered to the OPFA's address as follows.

41 Matroosberg Road
Riverwalk Office Park
Block A, 4th Floor
Ashlea Gardens, Pretoria
Tender No: OPFA/PR/062024

10.3. Bidders must ensure that they register their bid and place on tender box located in reception.

10.4. Late submissions and bids submitted by means of e-mail, telegram, telex facsimile, electronic or similar means shall not be considered.

11. TENDER SUBMISSION FORMAT

11.1. The OPFA requires one original copy of the bid completed bid document and supporting documents (**hard copy**) and one soft copy in a memory stick or compact disc. All submissions must be made as per paragraph 10 above.

12. REGISTRATION WITH CENTRAL SUPPLIER DATABASE

12.1. The OPFA will not award any bid to a supplier who is not registered as a prospective supplier on the Central Supplier Database (CSD) as required in terms of National Treasury National Treasury SCM Instruction Note 4A of 2016/2017.

13. BID VALIDITY PERIOD

13.1. The bid validity period will be one hundred and twenty (120) days from the closing of the tender.

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14. ADDITIONAL INFORMATION REQUIRED

14.1. The following additional information is required: A sworn declaration and/or proof that a bidder:

- Is not participating and contributing to any retirement fund for its employees or
- Is participating and contributing to a pension or provident fund and contributions are not in arrears. As proof, a confirmation of their contribution status from their retirement fund administrator must be submitted together with the declaration.

15. PROTECTION OF PERSONAL INFORMATION

15.1. "Personal Information" means personal information as defined in the Protection of Personal Information Act, 2013 (Act No. 4 of 2013), as amended from time to time.

15.2. All information collected and submitted by the bidders will be used by the OPFA for the evaluation and adjudication of this bid to determine the bidders' suitability and compliance to deliver the goods/services required. By submitting this bid the bidder gives consent for the OPFA to process the personal information provided by the bidder accordingly.

15.3. "Personal Information" (PI) shall mean the race, gender, sex, pregnancy, marital status, national or ethnic origin, colour, sexual orientation, age, physical or mental health, disability, religion, conscience, belief, culture, language and birth of a person; information relating to the education or the medical, financial, criminal or employment history of the person; any identifying number, symbol, email address, physical address, telephone number, location information, online identifier or other particular assignment to the person; the biometric information of the person; the personal opinions, views or preferences of the person; correspondence sent by the person that is implicitly or explicitly of a private or confidential nature or further correspondence that would reveal the contents of the original correspondence; the views or opinions of another individual about the person whether the information is recorded electronically or otherwise.

15.4. The parties acknowledge that for the purposes of this bid and agreement the parties may come into contact with or have access to PI and other information that may be classified or

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deemed as private or confidential and for which the other party is responsible. Such PI may also be deemed or considered as private and confidential as it relates to any third party who may be directly or indirectly associated with this agreement. Further, it is acknowledged and agreed by the parties that they have the necessary consent to share or disclose the PI and that the information may have value.

- 15.5. The parties agree that they will at all times comply with POPIA's Regulations and Codes of Conduct and that it shall only collect, use and process PI it comes into contact with pursuant to this agreement in a lawful manner, and only to the extent required to execute the services, or to provide the goods and to perform their respective obligations in terms of this agreement.
- 15.6. The parties agree that it shall put in place, and at all times maintain, appropriate physical, technological, and contractual security measures to ensure the protection and confidentiality of PI that it, or its employees, its contractors or other authorised individuals comes into contact with pursuant to this agreement.
- 15.7. Notify each other immediately where it has reasonable grounds to believe that the Personal Information in respect of this agreement, which has been provided to it including any Personal Information which it has processed, has been lost, destroyed, or accessed or acquired by any unauthorised person.
- 15.8. Unless so required by law, the parties agree that it shall not disclose any PI as defined in POPIA to any third party without the prior written consent of the other party, notwithstanding anything to the contrary contained herein, shall any party transfer any PI out of the Republic of South Africa.
- 15.9. The bidder and OPFA will implement all the necessary processes and programs to ensure that all the data is secure at all times and not accessible by any unauthorised parties.

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE OFFICE OF PENSION FUNDS ADJUDICATOR

BID NUMBER:	OPFA/PR/062024	CLOSING DATE:	06 FEBRUARY 2025	CLOSING TIME:	11:00
DESCRIPTION	PROVISION OF PUBLIC RELATION (PR) AND COMMUNICATION SERVICES				

BID RESPONSE DOCUMENTS MUST BE SUBMITTED ELECTONICALLY

BID MUST BE SUBMITTED TO: 41 MATROOSBERG ROAD, RIVERWALK OFFICE PARK, ASHLEA GARDENS, 0081, 4TH FLOOR BLOCK A

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO		TECHNICAL ENQUIRIES MAY BE DIRECTED TO:	
CONTACT PERSON	Magadi Tshitannye	CONTACT PERSON	Magadi Tshitannye
TELEPHONE NUMBER	012 748 4000	TELEPHONE NUMBER	012 748 4000
FACSIMILE NUMBER		FACSIMILE NUMBER	
E-MAIL ADDRESS	tenders@pfa.org.za	E-MAIL ADDRESS	tenders@pfa.org.za

SUPPLIER INFORMATION

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

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

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

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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:.....

SBD 4: 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.

Bidder's declaration

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

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

Full Name	Identity Number	Name of State institution

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

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

2.2.1 If so, furnish particulars:

.....
.....

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

2.3.1 If so, furnish particulars:

.....
.....

3 DECLARATION

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

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

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

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

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

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.

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

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SBD 6.1 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.

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.

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- 1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

- (a) “tender” means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) “**price**” means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) “**rand value**” means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) “**tender for income-generating contracts**” means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) “**the Act**” means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

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

80/20	or	90/10
$Ps = 80 \left(1 - \frac{Pt - Pmin}{Pmin} \right)$	or	$Ps = 90 \left(1 - \frac{Pt - Pmin}{Pmin} \right)$

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:

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

Where

P_s = Points scored for price of tender under consideration

P_t = Price of tender under consideration

P_{max} = 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 (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
51% or more ownership by black people	5	
51% or more ownership by black women	5	
30% or more ownership by people living with disabilities	3	
30% or more ownership by youth	2	
EME/QSE	5	
Total points allocated	20	
Number of points claimed by the bidder		

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

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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:

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ADDRESS:

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