

## REQUEST FOR PROPOSALS

<b>RFQ REFERENCE NUMBER</b>	<b>RFP 07-11-2025</b>	
<b>PROJECT NAME/ DESCRIPTION OF GOODS, WORK OR SERVICES</b>	<b>APPOINTMENT OF A SERVICE PROVIDER FOR CONDUCTING A REBRANDING EXERCISE FOR THE C-BRTA FOLLOWING ITS 25TH ANNIVERSARY CAMPAIGN DURING THE 2023/24 FINANCIAL YEAR.</b>	
<b>BRIEFING SESSION DETAILS</b>	<b>Compulsory</b> (please tick or cross the applicable session)	<b>N/A</b>
	<b>Non-compulsory</b> (please tick or cross the applicable session)	<b>N/A</b>
	<b>Date: N/A</b> <b>Time: N/A</b> <b>Venue/ platform: N/A</b>	
<b>RFP CLOSING DETAILS</b>	<b>Date: 23 JANUARY 2026</b> <b>Time: 11h00 a.m.</b> <b>RFP must be submitted to both Emails:</b> <a href="mailto:Quotation7@cbrta.co.za">Quotation7@cbrta.co.za</a> & <a href="mailto:Quotation5@cbrta.co.za">Quotation5@cbrta.co.za</a>	
<b>RFQ VALIDITY PERIOD</b>	60 Working days (Commencing from the official closing date)	
<b>ENQUIRIES</b>	<a href="mailto:Quotation7@cbrta.co.za">Quotation7@cbrta.co.za</a> & <a href="mailto:Quotation5@cbrta.co.za">Quotation5@cbrta.co.za</a>	

## DIRECTIVE TO BIDDERS ON COMPLETION OF STANDARD BIDDING DOCUMENT FORMS OF BID PROPOSAL

The purpose of this document is to guide bidders on the completion of standard bidding document forms of the C-BRTA bid.

The date on all standard bidding documents must be a date which is within the bid/RFQ/RFP advertising period.

The last column of the table below must be ticked as an indication that each document and its requirements have been complied with by the bidder.

DOCUMENT	DIRECTIVE	COMPLIED/ NOT COMPLIED
Invitation to Bid	The bidder is required to complete this document in full and signed off. The bidder must tick (circle/erase) <b>“YES OR NO”</b> on this document. The bidder may not ignore any clause and/or write <b>“not applicable (N/A)”</b> unless it is the only option available, e.g., are you a foreign based supplier for the goods/servicers/works offered? If the answer is no, then on the questionnaire to bidding foreign suppliers. The bidder may write N/A.	
Bidder's Disclosure	This document must be completed in full and be signed off. The bidder must tick (circle/erase) <b>“YES OR NO”</b> on this document and indicate not applicable where necessary. The bidder must disclose if the company or any of its directors have an interest in other companies whether they bid or not. Should a bidder have more companies to declare, such information can be provided on a separate sheet in the format prescribed. The information captured or disclosed for each director/ owner etc must be in line with what is captured in the central supplier database report.	
Central supplier database report	The bidder must attach a Central Supplier Database report printed from <a href="https://secure.csd.gov.za/">https://secure.csd.gov.za/</a>	
Preference points claim form	The bidder must fully complete the SBD form and sign off. The bidder must allocate correct preference points, the preference points claimed will be verified using the following:  - Broad-Based Black Economic Empowerment Certificate (B-BBEE certificate) - Central Supplier Database report  The bidder must submit the documents above to qualify for preference points.	
Pricing schedule	The bidder must complete the supplied pricing schedule and sign-off. The bidder may add other applicable costs which may not be covered by the C-BRTA pricing schedule. In addition, the bidder must submit a detailed price quotation on the company letterhead.	
Bid proposal	The bidder must submit a detailed bid proposal in line with the specifications/terms of reference, if applicable	

**PART A  
INVITATION TO BID**

<b>YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE CROSS-BOARDER ROAD TRANSPORT AGENCY</b>							
BID NUMBER:	RFP 07-11-2025	CLOSING DATE:	23/01/2026	CLOSING TIME:	11H00		
DESCRIPTION	<b>APPOINTMENT OF A SERVICE PROVIDER FOR CONDUCTING A REBRANDING EXERCISE FOR THE C-BRTA FOLLOWING ITS 25TH ANNIVERSARY CAMPAIGN DURING THE 2023/24 FINANCIAL YEAR.</b>						
<b>BID RESPONSE DOCUMENTS MAY BE SUBMITTED VIA THE OFFICIAL EMAIL ADDRESS ON THE COVER PAGE</b>							
<b>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO</b>				<b>TECHNICAL ENQUIRIES MAY BE DIRECTED TO:</b>			
CONTACT PERSON	SCM			CONTACT PERSON	SCM		
TELEPHONE NUMBER	012 471 2000			TELEPHONE NUMBER	012 471 2000		
FACSIMILE NUMBER	N/A			FACSIMILE NUMBER	N/A		
	<a href="mailto:Quotation7@cbrta.co.za">Quotation7@cbrta.co.za</a>				<a href="mailto:Quotation7@cbrta.co.za">Quotation7@cbrta.co.za</a>		
E-MAIL ADDRESS	<a href="mailto:Quotation5@cbrta.co.za">Quotation5@cbrta.co.za</a>			E-MAIL ADDRESS	<a href="mailto:Quotation5@cbrta.co.za">Quotation5@cbrta.co.za</a>		
<b>SUPPLIER INFORMATION</b>							
NAME OF BIDDER							
POSTAL ADDRESS							
STREET ADDRESS							
TELEPHONE NUMBER	CODE		NUMBER				
CELLPHONE NUMBER							
FACSIMILE NUMBER	CODE		NUMBER				
E-MAIL ADDRESS							
VAT REGISTRATION NUMBER							
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA		
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?		<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]		
<b>QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS</b>							
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?				<input type="checkbox"/> YES <input type="checkbox"/> NO			
DOES THE ENTITY HAVE A BRANCH IN THE RSA?				<input type="checkbox"/> YES <input type="checkbox"/> NO			
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?				<input type="checkbox"/> YES <input type="checkbox"/> NO			
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?				<input type="checkbox"/> YES <input type="checkbox"/> NO			
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?				<input type="checkbox"/> YES <input type="checkbox"/> NO			
<b>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.</b>							

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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, 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](http://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.**

<b>Signature of bidder:</b>	
<b>Capacity Under Which This Bid Is Signed:</b> <b>(Proof of authority must be submitted e.g. company resolution)</b>	
<b>Date:</b>	

## **1. Terms of Reference Summary**

APPOINTMENT OF A SERVICE PROVIDER FOR CONDUCTING A REBRANDING EXERCISE FOR THE C-BRTA FOLLOWING ITS 25TH ANNIVERSARY CAMPAIGN DURING THE 2023/24 FINANCIAL YEAR.

## **2. Introduction and Background**

- 2.1. The C-BRTA is expected conduct a rebranding exercise following its successful 25th Anniversary Campaign during the 2023/24 financial year. To achieve this goal, the Agency requires the services of an experienced and reputable Brand and Advertising Agency to conduct this exercise and deliver the final product by 06 March 2026. The project will entail conducting research to understand the C-BRTA's mandate and its operational environment. This will enable the appointed company to work with the leadership of the Agency to come up with a corporate narrative which will translate into an overall brand promise that will underpin the new Corporate Identity (CI).

The objectives and deliverables of this project includes the following;

- To give the C-BRTA new identity that will reflect its future and cement its authority in the cross-border road transport industry.
- Develop a logo (inclusive of the logo mark and the word mark). These must include a creative rationale.
- Develop a position statement that will outline the C-BRTA' brand position.
- Develop a comprehensive Corporate Identity Manual.
- Develop corporate templates which must include, Company Letterheads, PowerPoint Presentations, Business Cards, Corporate folders

## **3. PURPOSE**

Following the C-BRTA's 25th Anniversary commemoration, the Agency identified a need to conduct a rebranding exercise to give the Agency a new identity in line with its new vision and future plans. The C-BRTA was established in 1998 to facilitate the movement of passengers and goods on behalf of the Government of South Africa. Since its establishment, the Agency went through many difficult challenges in its quest to discharge its mandate. In the early years, the Agency struggled to stay afloat as well as to deliver on its mandate. However, through the resilience and a sterling job by its employees, the C-BRTA has navigated these tough periods and established itself as a critical regulator in the cross-border road transport industry. The 25-year anniversary presented a significant milestone to the Agency and its journey.

This period presents an opportunity to conduct an introspection of its journey thus far and to map its future as well as to outline the role it will play in the industry going-forward.

#### **4. EXPECTED OUTCOMES/DELIVERABLES**

The project deliverables must include the following;

- 2 X consultative workshops with the C-BRTA management
- To give the C-BRTA new identity that will reflect its future and cement its authority in the cross-border road transport industry;
- Develop a logo (inclusive of the logo mark and the word mark). These must include a creative rationale;
- Develop a position statement that will outline the C-BRTA' brand position;
- Develop a comprehensive Corporate Identity Manual;
- Develop corporate templates which must include, Company Letterheads, PowerPoint Presentations, Business Cards, Corporate folders;
- Feedback session with the C-BRTA to provide an update with regards to the project;
- A session to present a rollout plan and the final product;
- A final session to launch the new CI to external stakeholders on a date to be determined by the C-BRTA. This must include a creative concept to launch the CI.

#### **5. SCOPE OF WORK**

The appointed service provider will be required to deliver a comprehensive rebranding exercise for the C-BRTA, which shall include but not be limited to the following:

##### **5.1. Research and Insights**

- Conduct research to understand the C-BRTA's mandate, operational environment, and stakeholder perceptions.
- Use the findings to inform the development of a corporate narrative and brand positioning.

##### **5.2. Corporate Identity Development**

- Develop a new corporate identity (CI) that reflects the Agency's future vision and strengthens its authority in the cross-border road transport industry.
- Design a new logo (logo mark and word mark) with a supporting creative rationale.
- Develop a brand position statement and an overarching brand promise/narrative.

##### **5.3. Corporate Identity Manual**

- Produce a comprehensive CI manual that outlines brand elements such as typography, colour palette, imagery, and correct brand usage guidelines.

##### **5.4. Corporate Templates**

- Design standard templates, including but not limited to:
  - Company letterheads
  - PowerPoint presentations
  - Business cards
  - Corporate folders

##### **5.5. Stakeholder Engagement and Consultation**

- Facilitate a minimum of two (2) consultative workshops with C-BRTA management.

- Provide regular feedback sessions to share progress and gather input.
- Present the final rebranding outputs and rollout plan to the Agency's leadership.

#### **5.6. Rollout Plan and Launch Support**

- Develop a rollout plan for the implementation of the new CI across the Agency.
- Conceptualise and deliver a creative concept for the external launch of the new CI.

#### **5.7. Project Management and Reporting**

- Develop a detailed project plan with timelines to guide delivery.
- Provide progress reports in line with C-BRTA's reporting requirements.
- Ensure completion and delivery of the project by 06 March 2026.

### **6. METHODOLOGY/ APPROACH TO THE REBRANDING EXERCISE**

The successful service provider must demonstrate an extensive experience on similar projects and must provide a portfolio of evidence with contactable references. In addition, they must develop a detailed project plan with timelines to guide the entire project and showcase their delivery model.

The first phase of the project will entail conducting research to understand the C-BRTA's mandate and its operational environment. This will enable the appointed Agency to work with the leadership of the Agency to come up with a corporate narrative which will translate into an overall brand narrative/promise that will underpin the new Corporate Identity (CI). This will be followed by the actual process of developing the new Corporate Identity/brand with related deliverables as outlined in the project deliverables.

### **7. TIMEFRAMES:**

The Project must be complete by 06 March 2026

### **8. REPORTING REQUIREMENTS**

The service provider will report to C-BRTA in line with the approved project plan.



## 9. Pricing Schedule

### PRICING SCHEDULE – FIRM PRICES

<b>Name of bidder:</b>	<b>RFQ No: RFP 07-11-2025</b>
<b>Closing Time: 11:00</b>	<b>Closing date:23/01/2026</b>

OFFER TO BE VALID FOR **60 DAYS** FROM THE CLOSING DATE OF RFP.

NO	ITEM DESCRIPTION	SERVICE DESCRIPTION	QUANTITY	PRICE (INCLUDING VAT)
1.	<b>Research and Insights</b>	Conduct research to understand the C-BRTA's mandate, operational environment, and stakeholder perceptions.  Use the findings to inform the development of a corporate narrative and brand positioning.	1	R
2.	<b>Corporate Identity Development</b>	Develop a new corporate identity (CI) that reflects the Agency's future vision and strengthens its authority in the cross-border road transport industry.  Design a new logo (logo mark and word mark) with a supporting creative rationale.  Develop a brand position statement and an overarching brand promise/narrative.	1	R
3.	<b>Corporate Identity Manual</b>	Produce a comprehensive CI manual that outlines brand elements such as typography, colour palette, imagery, and correct brand usage guidelines.	1	R
4.	<b>Corporate Templates</b>	Design standard templates, including but not limited to: Company letterheads PowerPoint presentations Business cards corporate folders	1	R
5.	<b>Stakeholder Engagement and Consultation</b>	Facilitate a minimum of two (2) consultative workshops with C-BRTA management.  Provide regular feedback sessions to share progress and gather input.  Present the final rebranding outputs and rollout plan to the Agency's leadership.	1	R

6.	<b>Rollout Plan and Launch Support</b>	Develop a rollout plan for the implementation of the new CI across the Agency. Conceptualise and deliver a creative concept for the external launch of the new CI.	1	R
7.	<b>Project Management and Reporting</b>	Develop a detailed project plan with timelines to guide delivery. Provide progress reports in line with C-BRTA's reporting requirements. Ensure completion and delivery of the project by 06 March 2026.	1	R
<b>TOTAL COST INCLUDING VAT</b>				<b>R</b>

## 10. EVALUATION CRITERIA

The bids will be evaluated using the 80/20 preference points system in terms of the Preferential Procurement Regulations 2022. The following three (3) steps will be followed to evaluate this bid (Functionality, Price, and Specific Goals and Administrative Compliance).

### 10.1. STEP 1: FUNCTIONALITY

- Service Providers who fails to obtain a score of 70 points or more in the functionality phase shall not be considered for further evaluation on price and specific goals.
- Bidders are requested to comply to all requirements stated in the table below:

<b>Evaluation Criteria</b>	<b>Points</b>
<b>Contextual Framework and Technical Understanding:</b>	
<b>I. Project Proposal and Methodology</b>	
<p>The service provider must provide a detailed proposal and demonstrate their knowledge on how the service provider will deliver this project in line with the scope of work this includes timelines.</p> <p>The project proposal and methodology must also demonstrate the following:</p> <ul style="list-style-type: none"> <li>• Rebranding experience and approach per scope of work.</li> <li>• Corporate narrative which will translate into an overall brand narrative/promise that will underpin the new Corporate Identity (CI).</li> </ul>	<b>30 Points</b>

<p><b>Scoring Matrix:</b></p> <p>Excellent: Satisfies the requirements, the response is comprehensive, unambiguous and demonstrates a thorough understanding of the requirement and provides details of how the requirements will be met in full = 30 points</p> <p>Acceptable: Satisfies the requirement. The response shows an acceptable level of understanding of the requirement and provides some satisfactory level of details on how the requirements will be fulfilled = 20 points</p> <p>Minor Reservations: Satisfies the requirement with minor reservations. The response addresses a broad understanding of the requirement but may lack details on how the requirement will be fulfilled in certain areas = 10 points</p> <p>Unacceptable: Does not meet the requirement. Does not comply and/or insufficient information provided = 0 points</p>	
<p><b>2. Company Reference letters</b></p>	
<p>Service providers must have solid industry experience with developing corporate identity including designing logo, developing corporate identity manuals, position statements and brand management and advertising.</p> <p>As proof the service provider must provide contactable reference letters from their previous or current clients for completed projects that are in line with this RFP for the past three (3) to five (5).</p> <p>The reference letters must be on the client's letter head and state the scope of work covered, clients contact details and signed by the client.</p> <p>Scoring Matrix</p> <p>Three (3) or more valid reference letters attached = 30 points</p> <p>Two (2) valid reference letters attached = 20 points</p> <p>One (1) valid reference letter attached = 10 points</p> <p>No reference letter attached = 0 points</p>	<p><b>30 Points</b></p>
<p><b>3. Team Leader's education and experience</b></p>	
<p>Scoring Matrix for Team Leaders Qualification</p> <p>Minimum qualification in Marketing/Communications/Brand Management and Graphic Design</p> <p>Master's degree or higher = 10 points. •</p> <p>Honours degree in = 8 points.</p> <p>Bachelor's degree = 6 points.</p>	<p><b>10 Points</b></p>

<p>Diploma in related field = 4 points.</p> <p>No formal qualification or a related field = 0 points •</p> <p>Proof: attach certified copy of qualification</p>	
<p><b>Scoring Matrix for Team Leaders Experience</b></p> <p>Proven experience in corporate branding, advertising, corporate identity development and project management for Communication/Marketing related projects. With expertise in the following;</p> <ul style="list-style-type: none"> <li>• Leading and conducting corporate rebranding/identity development projects</li> <li>• Leading Brand management projects</li> <li>• Leading Corporate Communication, Marketing and advertising projects</li> <li>• Leading Graphic Design (Brand and Visual Communication)</li> </ul> <p>8 and more years' experience in leading and conducting corporate rebranding/identity development exercises and brand management projects = 10 points</p> <p>5 - 7 years' experience in leading and conducting corporate rebranding/identity development exercises and brand management projects = 8 points</p> <p>3 -4 years' experience in leading and conducting corporate rebranding/identity development exercises and brand management projects = 6 points</p> <p>1-2 years' experience in leading and conducting corporate rebranding/identity development exercises and brand management projects = 4 points</p> <p>0 year experience in leading and conducting corporate rebranding/identity development exercises and brand management projects = 0 points</p> <p>Proof: Attach CV clearly detailing experience, skills and competencies in organizational culture surveys and change management. CV to include contactable references</p>	<p><b>10 Points</b></p>
<p><b>4. Project Team</b></p>	
<p>The service provider must submit FOUR (4) brief Curriculum Vitae(s) (CVs) of key personnel of the service provider team indicating 5 years or more relevant experience coupled with a three-year tertiary qualification (bachelor's degree /diploma) in multimedia, marketing, communications, public relations and /or other related fields.</p> <p>Note to Service providers:</p> <p>At least one member of the key personnel working on the campaign should have a graphic design experience.</p>	<p><b>10 Points</b></p>

<p>Each member must have a minimum of 5 years' experience coupled with a three-year tertiary qualification (bachelor's degree / diploma) in order to be scored. • In the case where the team member has less than 5 years' experience, the service provider will be allocated a score of zero.</p> <p>Scoring Matrix</p> <p>5 years' relevant experience and more for all four (4) team members = 10 points Less than five (5) years' experience = 0 points</p> <p>Proof: Attach CV clearly detailing experience, skills and competencies in conducting corporate rebranding/identity development exercises and brand management projects. CV to include contactable references.</p>					
<b>5. Experience of the company</b>					
<b>Client Name</b>	<b>Project Scope</b>	<b>Project Description</b>	<b>Project Cost</b>	<b>Duration of Project</b>	<b>10 Points</b>
<b>Points allocation guide:</b>					
<b>More than relevant 5 projects</b>	<b>3-4 relevant projects</b>	<b>1-2 relevant projects</b>	<b>0 relevant projects</b>		
<b>10 points</b>	<b>8 points</b>	<b>5points</b>	<b>0 points</b>		
<b>Total Score:</b>					<b>100</b>

## 10.2. STEP 2: PRICE AND SPECIFIC GOALS (80+20)

- Only Bidders that have complied to all functionality requirements will be evaluated for price and Specific goals. Price and Specific goals will be evaluated as follows:
- In terms of the Preferential Procurement Policy Framework Act, 2000 (Act 5 of 2000), responsive bids will be adjudicated on the 80/20-preference point system in terms of which points are awarded to bidders based on the bid price (maximum 80 points) and Specific goals evaluation (maximum 20 points)

### Price Evaluation (80 Points)

Criteria	Points

<b>Price Evaluation</b>	<b>80</b>
$P_s = 80 \left( 1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$	

The following formula will be used to calculate the points for price:

Where

$P_s$  = Points scored for comparative price of bid under consideration

$P_t$  = Comparative price of bid under consideration

### Specific Goals (20 Points)

Specific goals Points allocation

A maximum of 20 points may be allocated to a bidder for specific goals in accordance with the table below:

No	The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system)	Means of verification	Number of points claimed (80/20 system) (To be completed by the tenderer)
A	BBBEE Level 1 – 4	10	BBBEE or Sworn affidavit submitted with the bid	
B	Women owned Enterprises	5	Central Supplier Database	
C	Enterprises owned by disabled people	5	Medical report	
<b>D</b>	<b>Total point claimed</b>	<b>D= A + B + C</b>		

### 10.3. STEP 3: ADMINISTRATIVE COMPLIANCE

Documents that must be submitted	Non-submission of any of the items against which a YES is denoted shall result to immediate disqualification	
Invitation to Bid – SBD 1	Complete and sign the supplied pro forma document.	

<b>Tax Status</b>	<p>Submit proof of Central Supplier Database report.</p> <p><b>NB:</b> The bidder will be given <b>Seven (7) days</b> to correct tax non-compliance prior award, failure will result to a disqualification.</p>	
<b>Bidders Disclosure Form – SBD 4</b>	Complete and sign the supplied pro-forma document.	
<b>Preference Point Claim Form – SBD 6.1</b>	Complete and sign the supplied pro-forma document. Non-submission will lead to a zero (0) score on Specific Goals.	

## 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

2.2 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:

.....  
.....

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<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.



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 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.

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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.

3.6.1 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

**Annexure A – bidders Disclosure form as per section 2.3 of SBD 4 form**

**Bidders are requested to declare all enterprises/ companies any of its directors/ trustees/ shareholders/members/ partners have interest in, the enterprises/companies disclosed must be equal or more than those disclosed on the Central Supplier Database (CSD) report.**

<b>Name of Director</b>	<b>Name of the enterprise/ company</b>	<b>Supplier No. (MAAA....)</b>	<b>Registration No</b>	<b>Director status [Active/Resigned]</b>

## 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 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 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 Points for specific goals for this tender will be allocated on the basis B-BBEE Status Level as shown in Table 1 below.

1.6 In order to claim points for specific goals, bidders must submit B-BBBEE Certificate and/or sworn affidavit, as the case may be.

1.7 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.

1.8 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>
$P_s = 80 \left( 1 - \frac{P_t - P_{min}}{P_{min}} \right)$	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:

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

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.* Thus, tenderers are required to indicate number of points in line with their B-BBEE Status Level and Ownership

No	The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system)	Means of verification	Number of points claimed (80/20 system) (To be completed by the tenderer)
A	BBBEE Level 1 – 4	10	BBBEE or Sworn affidavit submitted with the bid	
B	Women owned Enterprises	5	Central Supplier Database	
C	Enterprises owned by disabled people	5	Medical report	
D	Total point claimed	D= A + B + C		

## 5. SUBMISSIONS BY CONSORTIUMS AND JOINT VENTURES

5.1 If a submission is made by a consortium or Joint Venture, the points claimed for ownership must be detailed separately on an attachment showing the following:

- The percentage (%) of the contract allocated to each JV member or consortium member. This should also be included in an agreement to be made available on request by C-BRTA
- The percentage ownership by race category of each JV member or consortium member in each of the specific goals relevant to this bid.
- The total points claimed will be the sum of the percentage contract allocation for each partner multiplied by the percentage weighting for the race category, multiplied by the percentage ownership in the relevant specific goal.

## 6. DECLARATION WITH REGARD TO COMPANY/FIRM

6.1. Name of company/firm.....

6.2. Company registration number: .....

6.3. 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]

6.4. 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:** .....

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