in the footprints
NELSON MANDELA MUSEUM
Bhunga Building, Corner Owen Street and Nelson Mandela Drive, PO Box 5808, Mthatha, Eastern Cape.
Telephone : +27 (0) 47 501 9500
info@ nelsonmandelamuseum.org.za | www.nelsonmandelamuseum.org.za

**10 November 2026**

**REQUEST FOR QUOTATION RFQ 31 OF 2026 APPOINTMENT OF A QUALIFIED SERVICE PROVIDER TO FACILITATE THE NELSON MANDELA MUSEUM'S 2027/28 STRATEGIC PLANNING SESSION FOR EXECUTIVE MANAGEMENT AND COUNCIL.**

## 1. INVITATION TO QUOTE

The Nelson Mandela Museum (NMM) invites quotations from suitably qualified, experienced and competent service providers registered on the Central Supplier Database (CSD) to facilitate the Museum's strategic planning session for the 2027/28 financial year.

The Museum has an approved Strategic Plan for 2025–2030 and is preparing for the development of its Annual Performance Plan (APP) for 2027/28.

The strategic planning session aims to assess institutional performance, review strategic priorities, identify institutional challenges and formulate strategic interventions to advance the Museum's mandate.

Interested service providers are invited to submit quotations in accordance with the requirements and specifications contained in this Request for Quotation.

## 2. BACKGROUND

The Nelson Mandela Museum is a public entity responsible for preserving, promoting and interpreting the life, legacy, values and history of Nelson Mandela.

The Museum's strategic planning process is intended to ensure that institutional priorities, resources and planned activities remain aligned with its approved Strategic Plan, legislative mandate and national government planning frameworks.

The proposed session will provide an opportunity for Executive Management and Council to reflect on institutional performance, consider strategic challenges and opportunities, and provide direction for the 2027/28 planning cycle.

## 3. PURPOSE AND OBJECTIVES

The purpose of this appointment is to facilitate a participatory, structured and outcome-driven strategic planning process that promotes institutional alignment and informs the development of the Museum's 2027/28 APP.

The objectives are to:

1. Review the Museum's mandate, vision, mission, values and strategic objectives.
2. Assess progress against the approved Strategic Plan for 2025–2030 and relevant APP commitments.
3. Identify institutional challenges, opportunities, risks and strategic priorities.
4. Review proposed activities, performance indicators and targets for 2027/28.
5. Promote collaboration and strategic alignment between Management and Council.
6. Identify appropriate interventions to improve institutional performance.
7. Develop strategic recommendations and inputs to inform the 2027/28 APP.

## 4. SCOPE OF WORK

The appointed service provider will be responsible for facilitating the following strategic planning session:

### 4.1 Executive Management and Council Strategic Planning Session

- **Participants:** Executive Management and Nelson Mandela Museum Council.
- **Proposed date:** 24 November 2026.

- **Venue:** To be confirmed by the Nelson Mandela Museum.
- **Duration:** To be confirmed by the Museum.

The session will focus on the following:

a) Reviewing the Museum's strategic priorities and institutional performance.

b) Assessing alignment of proposed activities with the approved Strategic Plan for 2025–2030.

c) Deliberating on and prioritising strategic interventions for the 2027/28 financial year.

d) Reviewing proposed performance indicators, annual targets and performance measures.

e) Identifying institutional risks, constraints and opportunities that may affect the achievement of planned targets.

f) Providing strategic direction and recommendations to inform the development of the 2027/28 APP.

**4.2 Preparatory responsibilities**

Before the strategic planning session, the appointed service provider must:

1. Consult with the Museum's designated representative to understand the institutional requirements.
2. Review relevant institutional documents, including the approved Strategic Plan, previous APPs, Annual Performance Reports and other relevant planning documents supplied by the Museum.
3. Develop a suitable facilitation methodology and programme.
4. Identify key strategic planning issues requiring consideration.
5. Prepare appropriate presentations, discussion materials and facilitation tools.

### 4.3 Post-session responsibilities

Following the session, the service provider must:

1. Consolidate the discussions, decisions and strategic inputs.
2. Document key resolutions, recommendations and action points.
3. Identify proposed strategic interventions and their alignment with the Museum's mandate.
4. Provide inputs to inform the development of the 2027/28 APP.
5. Submit the final strategic planning report to the Museum.

## 5. DELIVERABLES

| No. | Deliverable | Description |
|---|---|---|
| 1 | Facilitation programme | A structured programme outlining the session objectives, activities and time allocation. |
| 2 | Facilitation methodology | A proposed approach and tools to ensure effective participation and achievement of the session objectives. |
| 3 | Strategic planning facilitation | Facilitation of the Executive Management and Council strategic planning session on 24 November 2026. |
| 4 | Consolidated strategic planning report | A comprehensive report documenting discussions, findings, strategic priorities, decisions, recommendations and action points. |
| 5 | APP inputs | Strategic recommendations and inputs to inform the 2027/28 APP, including proposed activities, performance indicators and targets where applicable. |

The draft programme and methodology must be submitted to the Museum for consideration before the session.

The final consolidated report must be submitted within five (5) working days after the session, unless otherwise agreed in writing with the Museum.

All deliverables will be subject to review and acceptance by the Museum's designated representative.

## 6. REQUIRED EXPERIENCE AND COMPETENCIES

Bidders must demonstrate that they possess the necessary qualifications, experience and competencies to undertake the assignment.

The following will be required:

1. Proven experience in facilitating strategic planning sessions for public sector institutions or organisations.
2. Demonstrable knowledge of public sector strategic planning and Annual Performance Plan development.
3. Strong facilitation, analytical, presentation and report-writing skills.
4. Relevant qualifications and experience of the proposed facilitator.
5. Knowledge and understanding of the Revised Framework for Strategic Plans and Annual Performance Plans.
6. Understanding of government planning, monitoring and performance management processes.

Knowledge of museums, heritage management, arts, culture or heritage tourism will be an added advantage.

Bidders must submit the CV of the proposed facilitator, certified or verifiable qualification evidence and relevant supporting documentation.

## 7. COMPULSORY DOCUMENTS TO BE SUBMITTED

Bidders must submit the following documentation with their quotations:

Completed quotation and pricing schedule

SBD 1 – Invitation to Bid Completed and signed

SBD 3.3- Completed and signed

SBD 4 – Bidder's Disclosure Completed and signed

SBD 6.1 – Preference Points Claim Form completed and signed

SBD 8 – Declaration of Bidder's Past Supply Chain Management Practices Completed and signed

SBD 9 – Certificate of Independent Bid Determination completed and signed

## 7.1 SUPPORTING DOCUMENTATION

Proposed facilitator's CV

Supporting qualifications of the proposed facilitator

Evidence of previous strategic planning facilitation assignments

At least two relevant references from previous clients, with contact details

Proposed methodology, approach and understanding of the assignment

## 8. FUNCTIONALITY EVALUATION

Quotations will first be evaluated against the functionality criteria below. The evaluation will be conducted out of 100 points. Only bidders who achieve a minimum qualifying score of 60 out of 100 points will proceed to the next stage of evaluation.

### 8.1 Consolidated Functionality Evaluation Criteria and Scoring Guidelines

| No. | Evaluation criterion | Scoring guidelines | Maximum points |
|---|---|---|---|

| | | | |
|---|---|---|---|
| 1 | **Relevant strategic planning facilitation experience** | No relevant experience or supporting evidence= **0 points**.<br><br>One relevant assignment=**10 points.**<br><br>Two relevant assignments =**20 points.**<br><br>Three or more relevant assignments: **30 points.**<br><br>***Evidence: Appointment letters, completion certificates or client reference letters.*** | **30** |
| 2 | **Public sector planning and APP development knowledge** | No demonstrated knowledge or inadequate proposal =**0 points.**<br><br>Limited understanding of public sector planning and APP development =**10 points**.<br><br>Good understanding of public sector planning and APP development= **18 points.**<br><br>Strong demonstrated understanding of the Revised Framework for Strategic Plans and Annual Performance Plans, including | **25** |

| | | | |
|---|---|---|---|
| | | performance indicators, annual targets and government planning processes=**25 points.**<br><br>***Evidence: Technical proposal and demonstrated knowledge in the submitted documentation.*** | |
| 3 | **Proposed methodology and approach** | No methodology submitted=**0 points**.<br><br>Inadequate methodology with limited explanation of the approach=**5 points.**<br><br>Adequate methodology addressing preparation, facilitation and reporting= **12 points.**<br><br>Comprehensive, practical and clearly structured methodology addressing document review, preparation, stakeholder participation, facilitation techniques, strategic prioritisation and reporting= **20 points.**<br><br>***Evidence: Detailed technical proposal and proposed facilitation methodology.*** | **20** |

| | | | |
|---|---|---|---|
| 4 | **Qualifications and experience of proposed facilitator** | No relevant qualifications or supporting evidence: **0 points.**<br><br>Relevant qualification at NQF Level 6=**5 points.**<br><br>Relevant qualification at NQF Level 7=**10 points.**<br><br>Relevant qualification at NQF Level 8 or above, together with demonstrated relevant facilitation experience: **15 points**.<br><br>***Evidence: Facilitator's CV and copies of relevant qualifications.*** | **15** |
| 5 | **Relevant sector knowledge and references** | No relevant sector knowledge or references: **0 points.**<br><br>General public sector or institutional knowledge with one relevant reference: **5 points.**<br><br>Demonstrated knowledge of museums, heritage management, arts, culture or heritage tourism, supported by two or more relevant references= **10 points**. | **10** |

| | | | |
|---|---|---|---|
| | | ***Evidence: Technical proposal, project experience and client reference letters.*** | |
| | **TOTAL FUNCTIONALITY POINTS** | | 100 |

### 8.2 Minimum Qualifying Threshold

Bidders must achieve a minimum score of 60 points out of 100 to qualify for further evaluation.

Bidders scoring below 60 points will be eliminated from further evaluation and will not proceed to the price and preference points assessment.

The functionality assessment will be conducted objectively and consistently against the criteria and scoring guidelines stipulated in this RFQ.

The Museum reserves the right to verify the authenticity of qualifications, experience, references and supporting documents submitted by bidders.

## 09. PRICE AND PREFERENCE-POINT EVALUATION

### Applicable Preference Scoring System

**Points for this shall be awarded for:**

(a) **Price; and**

(b) **Specific Goals.**

(c) **Where 80 points will be allocated for price and 20 points allocated for specific goals**

| Category | | Sub-categories | Specific goals points | Verification documents |
|---|---|---|---|---|
| Local Supplier | 5 | O.R Tambo Suppliers | 5 | CIPC Registration Certificate (CK) or Proof of residence |
| | | Eastern Cape Supplier | 4 | |
| | | Anywhere in South Africa | 3 | |
| | | Non-South African | 0 | |
| Women-owned supplier | 4 | Black African Women | 4 | CIPC Registration Certificate (CK) and CSD Report |
| | | Non-Black African Women | 2 | |
| Youth Owned Supplier | 4 | Youth Owned (< 35-year-old persons) | 4 | CIPC Registration Certificate (CK) and CSD Report |
| | | Non-Youth Ownership (> 35-year-old persons) | 2 | |
| People living with disabilities | 3 | People living with disabilities | 3 | CSD Report |
| Small Micro, | 4 | SME – Owned by people with disability | 4 | Sworn Affidavit (BBBEE Affidavit) |
| | | SME – Black owned | 3 | |

| | | | | |
|---|---|---|---|---|
| **Medium & Enterprises** | | **SME – Other** | **2** | **CSD Report** |

## 8.2. EVALUATION PROCESS

The quotations will be evaluated in the following stages:

**Stage 1: Administrative and mandatory compliance**

The Museum will assess whether the bidder has submitted the required documentation and complied with the mandatory requirements of the RFQ.

**Stage 2: Functionality evaluation**

The technical proposals will be assessed against the functionality criteria contained in Section 8.

Only bidders achieving a minimum of 60 out of 100 points will proceed to the next evaluation stage.

**Stage 3: Price and preference points**

Evaluation of Price and Specific Goals (80/20 Preference Point System)

Bidders who meet the minimum functionality threshold will proceed to the evaluation of price and specific goals in accordance with the Preferential Procurement Regulations, 2022, and the Nelson Mandela Museum's Supply Chain Management (SCM) Policy.

The 80/20 preference point system will apply to this procurement, allocated as follows:

- 80 points for price.

- 20 points for specific goals, as determined by the Museum and indicated in the applicable SBD 6.1.

**Stage 4: Verification and recommendation**

The Museum reserves the right to verify information submitted by bidders, including qualifications, references, CSD registration, tax compliance and previous experience.

The recommendation for appointment will be made in accordance with the Museum's approved SCM Policy and applicable procurement prescripts.

## 10. PRICING SCHEDULE

Bidders must provide a comprehensive quotation covering all activities required to complete the assignment.

The quotation must include preparation, document review, facilitation, development of the methodology, report writing and submission of the final deliverables.

| No. | Description | Quantity | Total Amount (R) |
|---|---|---|---|
| 1 | Preparatory work and review of institutional strategic documents | 1 | |
| 2 | Development of facilitation methodology and programme | 1 | |
| 3 | Facilitation of Executive Management and Council strategic planning session | 1 | |

| | | | |
|---|---|---|---|
| 4 | Compilation and submission of consolidated strategic planning report and APP inputs | 1 | |
| | **Subtotal (excluding VAT)** | | |
| | **VAT (if applicable)** | | |
| | **TOTAL QUOTATION (VAT INCLUSIVE)** | | |

The quotation must:

1. Be submitted in South African Rand (ZAR).
2. Clearly indicate whether VAT is applicable.
3. Include all professional fees and incidental costs associated with the assignment.
4. Include travel, accommodation, subsistence and other related expenses, where applicable.
5. Clearly indicate the total amount payable for the complete assignment.
6. Remain valid for a period of 90 days from the closing date.

No additional costs will be considered unless approved in writing by the Museum before the costs are incurred.

## 11. SUBMISSION OF QUOTATIONS

Interested service providers must submit their quotations, together with all compulsory supporting documentation, to:

**Submission email:Supplychain@nelsonmandelamuseum.org.za**

**Closing date:** 19 November 2026

**Closing time:** 12:00

Quotations received after the stipulated closing date and time will not be considered.

Bidders are responsible for ensuring that their quotations are successfully received before the closing date and time.

### 12. Validity Period of Quotations

Quotations submitted shall remain valid for a period of 30 calendar days from the closing date of this RFQ.

During this period, bidders shall remain bound by their submitted prices, terms and conditions.

Should the Museum require additional time to finalise the evaluation and approval process, it may request bidders to extend the validity period in writing before the expiry of the original validity period. Any extension shall be subject to the bidder's written agreement.

### 12. ENQUIRIES

**All communications and enquiries/requests for clarification relating to this proposal should be directed to the contact person:**

| |
|---|
| **Ms. Akhona Mashologu** |
| **Tel: 047 501 9504** |
| **Email: akhona@nelsonmandelamuseum.org.za** |

| |
|---|
| **Supply Chain Specialist** |
| ***Technical Enquiries:*** |
| **Mr. Mandisi Msongelwa** |
| **Tel: 047 501 9507** |
| **Email:** mandisi@nelsonmandelamuseum.org.za |
| |

## 13 GENERAL TERMS AND CONDITIONS

- The Nelson Mandela Museum reserves the right to accept or reject any quotation, in whole or in part, and is not obliged to accept the lowest-priced quotation.
- The Museum reserves the right to cancel or withdraw this RFQ before appointment where justified and in accordance with applicable procurement prescripts.
- Bidders must disclose any actual or potential conflict of interest.
- The appointed service provider will be required to maintain confidentiality regarding all institutional information and documents accessed during the assignment.
- All reports, presentations, methodologies and other deliverables specifically produced for the Museum under this appointment shall become the property of the Nelson Mandela Museum, subject to applicable intellectual property rights.
- The appointed service provider may not subcontract or transfer the assignment without prior written approval from the Museum.
- The Museum reserves the right to verify all information submitted by bidders.

NELSON MANDELA MUSEUM
Bhunga Building, Corner Owen Street and Nelson Mandela Drive, PO Box 5808, Mthatha, Eastern Cape.
Telephone : +27 (0) 47 501 9500
info@ nelsonmandelamuseum.org.za | www.nelsonmandelamuseum.org.za



- No appointment or expenditure commitment will arise until the appointment has been formally approved and the necessary contractual arrangements have been concluded.
- The successful bidder will be required to enter into a service-level agreement or written appointment arrangement with the Museum, where applicable.
- Payment will be processed in accordance with the Museum's financial and payment procedures, following satisfactory delivery and acceptance of the agreed deliverables and submission of a valid invoice.

Signed by:Mandisi Msongelwa CA(SA)
Signed at:2026-11-11 17:57:23 +02:00
Reason:Witnessing Mandisi Msongelwa C



**Mr Mandisi Msongelwa CA(SA)**

**Acting Chief Executive officer**

# PART A
# INVITATION TO BID

| YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE *(NAME OF DEPARTMENT/ PUBLIC ENTITY)* | | | | | |
|---|---|---|---|---|---|
| BID NUMBER: | | CLOSING DATE: | | CLOSING TIME: | |
| DESCRIPTION | | | | | |
| **BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT *(STREET ADDRESS)*** | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

| **BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO** | | **TECHNICAL ENQUIRIES MAY BE DIRECTED TO:** | |
|---|---|---|---|
| CONTACT PERSON | | CONTACT PERSON | |
| TELEPHONE NUMBER | | TELEPHONE NUMBER | |
| FACSIMILE NUMBER | | FACSIMILE NUMBER | |
| E-MAIL ADDRESS | | E-MAIL ADDRESS | |

| **SUPPLIER INFORMATION** | | | | | |
|---|---|---|---|---|---|
| NAME OF BIDDER | | | | | |
| POSTAL ADDRESS | | | | | |
| STREET ADDRESS | | | | | |
| TELEPHONE NUMBER | CODE | | NUMBER | | |
| CELLPHONE NUMBER | | | | | |
| FACSIMILE NUMBER | CODE | | NUMBER | | |
| E-MAIL ADDRESS | | | | | |
| VAT REGISTRATION NUMBER | | | | | |
| SUPPLIER COMPLIANCE STATUS | TAX COMPLIANCE SYSTEM PIN: | | **OR** | CENTRAL SUPPLIER DATABASE No: | MAAA |
| ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED? | ☐Yes ☐No [IF YES ENCLOSE PROOF] | | ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED? | ☐Yes ☐No [IF YES, ANSWER THE QUESTIONNAIRE BELOW] | |

**QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS**

| | |
|---|---|
| IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? | ☐ YES ☐ NO |
| DOES THE ENTITY HAVE A BRANCH IN THE RSA? | ☐ YES ☐ NO |
| DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA? | ☐ YES ☐ NO |
| DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA? | ☐ YES ☐ NO |
| IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? | ☐ YES ☐ NO |

**IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.**

# PART B
# TERMS AND CONDITIONS FOR BIDDING

| | |
|---|---|
| **1.** | **BID SUBMISSION:** |
| 1.1. | BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION. |
| 1.2. | **ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED (NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.** |
| 1.3. | THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 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 THE BIDDER: .....

CAPACITY UNDER WHICH THIS BID IS SIGNED: .....
(Proof of authority must be submitted e.g. company resolution)

DATE: .....

# PRICING SCHEDULE
**(Professional Services)**

NAME OF BIDDER: .....BID NO.: .....

CLOSING TIME CLOSING DATE.....

OFFER TO BE VALID FOR .....DAYS FROM THE CLOSING DATE OF BID.

| ITEM NO | DESCRIPTION | BID PRICE IN RSA CURRENCY **(ALL APPLICABLE TAXES INCLUDED) |
|---|---|---|

1. The accompanying information must be used for the formulation of proposals.

2. Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project. R.....

3. PERSONS WHO WILL BE INVOLVED IN THE PROJECT AND RATES APPLICABLE (CERTIFIED INVOICES MUST BE RENDERED IN TERMS HEREOF)

| 4. PERSON AND POSITION | HOURLY RATE | DAILY RATE |
|---|---|---|
| ---------- | R---------- | ---------- |
| ---------- | R---------- | ---------- |
| ---------- | R---------- | ---------- |
| ---------- | R---------- | ---------- |
| ---------- | R---------- | ---------- |

5. PHASES ACCORDING TO WHICH THE PROJECT WILL BE COMPLETED, COST PER PHASE AND MAN-DAYS TO BE SPENT

| | | |
|---|---|---|
| ---------- | R---------- | ---------- days |
| ---------- | R---------- | ---------- days |
| ---------- | R---------- | ---------- days |
| ---------- | R---------- | ---------- days |

5.1 Travel expenses (specify, for example rate/km and total km, class of airtravel, etc). Only actual costs are recoverable. Proof of the expenses incurred must accompany certified invoices.

| DESCRIPTION OF EXPENSE TO BE INCURRED | RATE | QUANTITY | AMOUNT |
|---|---|---|---|
| ---------- | ..... | ..... | R..... |
| ---------- | ..... | ..... | R..... |
| ---------- | ..... | ..... | R..... |
| ---------- | ..... | ..... | R..... |

TOTAL: R.....

** "all applicable taxes" includes value- added tax, pay as you earn, income tax, unemployment insurance contributions and skills development levies.

Bid No.: .....

Name of Bidder: .....

5.2 Other expenses, for example accommodation (specify, eg. Three star hotel, bed and breakfast, telephone cost, reproduction cost, etc.). On basis of these particulars, certified invoices will be checked for correctness. Proof of the expenses must accompany invoices.

| DESCRIPTION OF EXPENSE TO BE INCURRED | RATE | QUANTITY | AMOUNT |
|---|---|---|---|
| _____ | ..... | ..... | R..... |
| _____ | ..... | ..... | R..... |
| _____ | ..... | ..... | R..... |
| _____ | ..... | ..... | R..... |

TOTAL: R.....

6. Period required for commencement with project after acceptance of bid .....

7. Estimated man-days for completion of project .....

8. Are the rates quoted firm for the full period of contract? *YES/NO

9. If not firm for the full period, provide details of the basis on which adjustments will be applied for, for example consumer price index. .....

.....

.....

.....

*[DELETE IF NOT APPLICABLE]

Any enquiries regarding bidding procedures may be directed to the –

(INSERT NAME AND ADDRESS OF DEPARTMENT/ENTITY)

Tel:

Or for technical information –

(INSERT NAME OF CONTACT PERSON)

Tel:

# 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[1] 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 consortium[2] 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.

3.5 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

---

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.

contract.

3.6 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.

3.7 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 ENHANCING COMPLIANCE, TRANSPARENCY AND ACCOUNTABILITY IN SUPPLY CHAIN MANAGEMENT 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** | |
| **SPECIFIC GOALS** | |
| **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:

**80/20** **or** **90/10**

$$Ps = 80\left(1 - \frac{Pt - P\,min}{P\,min}\right) \text{ or } \quad Ps = 90\left(1 - \frac{Pt - P\,min}{P\,min}\right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

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

3.2.1. **POINTS AWARDED FOR PRICE**

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

**80/20** **or** **90/10**

$$Ps = 80\left(1 + \frac{Pt - P\,max}{P\,max}\right) \text{ or } \quad Ps = 90\left(1 + \frac{Pt - P\,max}{Pmax}\right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmax = Price of highest acceptable tender

**4. POINTS AWARDED FOR SPECIFIC GOALS**

4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:

4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—

(a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or

(b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,

then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

**Table 1: Specific goals for the tender and points claimed are indicated per the table below.**

***(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.***

***Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)***

| The specific goals allocated points in terms of this tender | Number of points allocated (90/10 system) (To be completed by the organ of state) | Number of points allocated (80/20 system) (To be completed by the organ of state) | Number of points claimed (90/10 system) (To be completed by the tenderer) | Number of points claimed (80/20 system) (To be completed by the tenderer) |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

**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:** .....

.....

.....

.....

## DECLARATION OF TENDER'S SUPPLY CHAIN MANAGEMENT PRACTISES(SBD8)

## DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

1 This State Bidding Document must form part of all bids invited.

2 It serves as a declaration to be used by state entities in ensuring that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system.

3 The bid of any bidder may be rejected if that bidder, or any of its directors have:

a. abused the state entity's supply chain management system or committed any improper conduct in relation to such system;

b. been convicted for fraud or corruption during the past five years;

c. willfully neglected, reneged on or failed to comply with any government, municipal or other public sector contract during the past five years; or

d. been listed in the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004).

4 **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**

| Item | Question | Yes | No |
|---|---|---|---|
| 4.1 | Is the bidder or any of its directors listed on the National Treasury's Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector?<br>(Companies or persons who are listed on this Database were informed in writing of this restriction by the Accounting Officer/Authority of the institution that imposed the restriction after the *audi alteram partem* rule was applied).<br>**The Database of Restricted Suppliers now resides on the National Treasury's website(www.treasury.gov.za) and can be accessed by clicking on its link at the bottom of the home page.** | Yes<br>☐ | No<br>☐ |
| 4.1.1 | If so, furnish particulars: | | |

| | | | |
|---|---|---|---|
| 4.2 | Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)?<br><br>**The Register for Tender Defaulters can be accessed on the National Treasury's website (www.treasury.gov.za) by clicking on its link at the bottom of the home page.** | Yes ☐ | No ☐ |
| 4.2.1 | If so, furnish particulars: | | |
| 4.3 | Was the bidder or any of its directors convicted by a court of law (including a court of law outside the Republic of South Africa) for fraud or corruption during the past five years? | Yes ☐ | No ☐ |
| 4.3.1 | If so, furnish particulars: | | |

| Item | Question | Yes | No |
|---|---|---|---|
| 4.4 | Does the bidder or any of its directors owe any municipal rates and taxes or municipal charges to the municipality / municipal entity, or to any other municipality / municipal entity, that is in arrears for more than three months? | Yes ☐ | No ☐ |
| 4.4.1 | If so, furnish particulars: | | |

| | | | |
|---|---|---|---|
| 4.5 | Was any contract between the bidder any other organ of state terminated during the past five years on account of failure to perform on or comply with the contract? | Yes ☐ | No ☐ |
| 4.7.1 | If so, furnish particulars: | | |

**CERTIFICATION**

I, THE UNDERSIGNED (FULL NAME) .....

CERTIFY THAT THE INFORMATION FURNISHED ON THIS

DECLARATION FORM TRUE AND CORRECT.

I ACCEPT THAT, IN ADDITION TO CANCELLATION OF A CONTRACT, ACTION MAY BE TAKEN AGAINST ME. SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....  .....

**Signature**  **Date**

.....  .....

**Position**  **Name of Bidder**

## CERTIFICATE OF INDEPENDENT TENDER DETERMINATION(SBD9)

### CERTIFICATE OF INDEPENDENT BID DETERMINATION

1 This State Bidding Document (SBD) must form part of all bids[1] invited.

2 Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by, firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging).[2] Collusive bidding is a *pe se* prohibition meaning that it cannot be justified under any grounds.

3 National Treasury Supply Regulation 38 (1) prescribes that a supply chain management policy must provide measures for the combating of abuse of the supply chain management system, and must enable the accounting officer, among others, to:

a. take all reasonable steps to prevent such abuse;

b. reject the bid of any bidder if that bidder or any of its directors has abused the supply chain management system of the organ of the state or has committed any improper conduct in relation to such system; and

c. cancels a contract awarded to a person if the person committed any corrupt or fraudulent act during the bidding process or the execution of the contract.

4 This SBD serves as a certificate of declaration that would be used by institutions to ensure that, when bids are considered, reasonable steps are taken to prevent any form of bid-rigging.

5 In order to give effect to the above, the attached Certificate of Bid Determination (SBD 9) must be completed and submitted with the bid:

[1] **Includes price quotations, advertised competitive bids, limited bids and proposals.**

[2] **Bid rigging (or collusive bidding) occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and / or services for purchasers who wish to acquire goods and / or services through a bidding process. Bid rigging is, therefore, an agreement between competitors not to compete.**

I, the undersigned, in submitting the accompanying bid:

_____

(Bid Number and Description)

in response to the invitation for the bid made by:

_____

(Name of State Entity)

do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of: _____ that.:

(Name of Bidder)

1 I have read and understand the contents of this Certificate.
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect.
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign, the bid, on behalf of the bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:

    (a) has been requested to submit a bid in response to this bid invitation.
    (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
    (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder

6. 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[3] will not be construed as collusive bidding.

7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
   (a) prices;
   (b) geographical area where product or service will be rendered (market allocation)
   (c) methods, factors or formulas used to calculate prices;
   (d) the intention or decision to submit or not to submit, a bid;
   (e) the submission of a bid which does not meet the specifications and conditions of the bid; or
   (f) bidding with the intention not to win the bid.
8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.
9. 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] 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.

10. 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.

.....  .....

Signature  Date

.....

Position

.....

Name of Bidder