



MPUMALANGA ECONOMIC GROWTH AGENCY
MEGA OFFICE PARK
02 EASTERN BOULEVARD,
RIVERSIDE
MBOMBELA

PO BOX 952, NELSPRUIT, 1200
TEL: +27 13 492 5818
WWW.MEGA.GOV.ZA

BID

THE APPOINTMENT OF A PANEL OF SERVICE PROVIDERS TO PROVIDE INTERNAL AUDIT AND RELATED SERVICES FOR A PERIOD OF THIRTY-SIX (36) MONTHS

Issued by:

Mpumalanga Economic Growth Agency (“MEGA”)
Supply Chain Management Unit
MEGA OFFICE PARK
02 Eastern Boulevard
Riverside,
Mbombela,
1200

MEGA / 2027 / 05

CLOSING DATE: 12 NOVEMBER 2026 AT 12:00PM

NAME OF A BIDDER: _____

TOTAL PRICE (all inclusive): _____

**THE FOLLOWING PARTICULARS MUST BE FURNISHED
(FAILURE TO DO SO MAY RESULT IN YOUR BID BEING DISQUALIFIED)**

**PART A
INVITATION TO BID**

YOU ARE HEREBY INVITED TO BID FOR THE BELOW MENTIONED TENDER OF MPUMALANGA ECONOMIC GROWTH AGENCY

BID NUMBER:	MEGA / 2027 / 05	CLOSING DATE:	12 NOVEMBER 2026	CLOSING TIME:	12H00
DESCRIPTION	BID FOR THE APPOINTMENT OF A PANEL OF SERVICE PROVIDERS TO PROVIDE INTERNAL AUDIT AND RELATED SERVICES FOR A PERIOD OF THIRTY-SIX (36) MONTHS				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
MEGA Office Park, 02 Eastern Boulevard, Riverside, Mbombela, 1200, Ground floor					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Mr. S Lekhuleni		CONTACT PERSON	Ms. F Nyathi	
TELEPHONE NUMBER	013 492 5818		TELEPHONE NUMBER	013 492 5818	
FACSIMILE NUMBER			FACSIMILE NUMBER		
E-MAIL ADDRESS	sibusiso.lekhuleni@mega.gov.za		E-MAIL ADDRESS	fikile.nyathi@mega.gov.za	
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 BIDDER:

.....

CAPACITY UNDER WHICH THIS BID IS SIGNED:

.....

(Proof of authority must be submitted e.g. company resolution)

DATE:

.....

SECTION 1: BIDDING INFORMATION

TERMS OF REFERENCE: MEGA/2027/05

**BID FOR THE APPOINTMENT OF A PANEL OF SERVICE PROVIDERS TO PROVIDE
INTERNAL AUDIT AND RELATED SERVICES FOR A PERIOD OF THIRTY-SIX (36)
MONTHS**

1. INTRODUCTION

The Mpumalanga Economic Growth Agency, hereinafter referred to as “**MEGA**” is a schedule 3D entity of the Mpumalanga Provincial Government with a mandate of stimulating economic growth in the Province through inter alia:-

- (i) the provision of funding to SMMEs, Co-operatives and Agricultural enterprises, as well as the provision of housing loans to citizens of Mpumalanga within the gap market;
 - (ii) proactively identifying investment opportunities within the Province, attracting investment into such opportunities through various trade and investment promotion initiatives, as well as facilitating that such investments into the province derive maximum development impact;
 - (iii) delivering massive infrastructure within the Province;
 - (iv) the development and management of property in the form of industrial parks which stimulate economic activity in the Province.
- (v) In exercising its powers and functions as articulated in the Act, [“the MEGA Act 1 of 2010”], the entity must continually broaden the participation of Mpumalanga citizens in all the sectors of the economy and accordingly contribute, whether directly or indirectly, to the alleviation of poverty, unemployment and inequality.

2. PURPOSE

The Mpumalanga Economic Growth Agency intends to appoint a panel of service providers to provide internal audit and related services for a period of thirty-six (36) months.

3. BACKGROUND

The Mpumalanga Economic Growth Agency (MEGA) intends to appoint a panel of suitably qualified and experienced service providers to provide Internal Audit and related professional services for a period of thirty-six (36) months. The appointed panel will supplement the capacity of MEGA's Internal Audit Unit by providing specialised internal audit and related services on an as-and-when-required basis, in accordance with assignment-specific Terms of Reference.

4. SCOPE OF WORK

MEGA intends to establish a panel of suitably qualified and experienced service providers to supplement the capacity of the Internal Audit Unit and to provide specialised professional services as and when required during the tenure of the panel.

Individual assignments will be issued through assignment-specific Terms of Reference setting out the objectives, detailed scope, deliverables, timelines, required competencies, reporting requirements and any other assignment-specific conditions.

1.1 Internal Audit Assurance and Advisory Services

- 1.1.1** Execution of risk-based internal audit assignments in accordance with the approved Internal Audit Plan.
- 1.1.2** Assessment of the adequacy and effectiveness of governance, risk management and internal control processes.
- 1.1.3** Compliance reviews.
- 1.1.4** Performance and operational audits.
- 1.1.5** Supply Chain Management and procurement/probity reviews.
- 1.1.6** Follow-up reviews on previously reported audit findings.
- 1.1.7** Governance and risk management reviews.
- 1.1.8** Fraud risk and control-related reviews, where required.
- 1.1.9** Other internal audit assurance and advisory assignments approved by the appropriate authority.

1.2 Information and Communication Technology (ICT) Assurance Services

- 1.2.1** General and application controls reviews.
- 1.2.2** IT governance reviews.
- 1.2.3** Cybersecurity-related assurance reviews.
- 1.2.4** Information security assessments.
- 1.2.5** Data analytics.
- 1.2.6** Threat and vulnerability assessments.
- 1.2.7** Business continuity and disaster recovery reviews.
- 1.2.8** Other specialised ICT assurance assignments.

1.3 Financial Statements and Financial Reporting Reviews

- 1.3.1** Review of Annual Financial Statements and supporting working papers.
- 1.3.2** Review of financial statement disclosures.
- 1.3.3** Review of Annual Financial Statements for compliance with the applicable financial reporting framework.

- 1.3.4 Review of supporting schedules and reconciliations.
- 1.3.5 Review of audit-readiness processes.
- 1.3.6 Other financial reporting-related assurance services.

5. PANEL UTILISATION GUIDELINES

- 5.1 The panel shall comprise of a **maximum of five (5) service providers** who meet all mandatory requirements, achieve the minimum functionality threshold of 70 points, and obtain the highest final evaluation scores, in accordance with the approved evaluation methodology.
- 5.2 Appointment to the panel does not guarantee any **minimum work, expenditure or number of assignments**.
- 5.3 Assignments will be allocated through an **approved and equitable panel-utilisation mechanism**, considering the required expertise, capacity, availability and performance.
- 5.4 Where quotations are required, the applicable **Terms of Reference (TOR)** will be issued to qualifying panel members to ensure a fair and transparent process.
- 5.5 Individual assignments shall be awarded in accordance with the **approved evaluation methodology, MEGA SCM Policy and applicable procurement prescripts**.
- 5.6 Where fewer than five (5) bidders meet all prescribed requirements, MEGA shall **not be obliged to appoint five (5) service providers**.

All panel appointments and assignments shall be subject to the **PFMA, applicable Treasury Regulations and Instructions, MEGA SCM Policy, preferential procurement requirements and other applicable legislation and procurement prescripts, as amended from time to time**.

6. EVALUATION CRITERIA

- (i) The evaluation criteria for the assessment of the proposals will be based on both qualitative and financial aspects of the proposal. Service providers will be evaluated on functionality.
- (ii) The bidders who score points which meet the minimum threshold provided on functionality will further be evaluated on price and on specific goals in terms of the Preferential Procurement Policy Framework, Act 5 of 2000 and Regulations of 2022.
 - All bidders who score less than 70 out of 100 points for functionality will not be considered further.
 - Evaluation will be conducted in accordance with MEGA Supply Chain Management Policy and Preferential Procurement Regulations of 2022.

THE ADJUDICATION METHOD

The three-stage tender evaluation and awarding process will be used to adjudicate the tender documents that will be submitted by potential bidders. The stages are described as being;

- Stage 1: Responsiveness assessment: Tenders evaluated for responsiveness based on the mandatory requirements stated.
- Stage 2: Functionality assessment
- Stage 3: Financial offer (tender price) evaluation and Empowerment adjudication: Evaluation of the bidders scores for the price submitted and scoring of bidders on Preferential Procurement Regulations of 2022 will be recommended for appointment.

80/20 evaluation criteria will be used for this bid.

Appointment of a preferred bidder(s)

Subject to the provisions of MEGA Supply Chain Management Policy and the Preferential Procurement regulations of 2022,

MEGA reserves the right to:

- a) Appoint one or more bidder(s) to provide the required service.
- b) Where applicable, negotiate the final fee or rates with the preferred bidder(s).
- c) Consider the guidelines and prescribed hourly remuneration rates for consultants as provided in the **National Treasury Instruction 01 of 2013/2014: Cost Containment Measures**, where relevant.

6.1 COMPULSORY ADMINISTRATIVE REQUIREMENTS

All the submitted proposals will be assessed for compliance with the mandatory requirements listed below:

6.1(A): MANDATORY REQUIREMENTS

(Failure to meet the requirements below, the bidder will be disqualified)

1.	Company /CC/Trust/Partnership registration certificates
2.	Fully completed pricing schedule
3.	Fully completed, signed Standard bidding documents (SBD1; SBD4; SBD6.1)
4.	Letter of authority to sign the bidding documents
5.	Certified copies of Directors' or Shareholders Identity documents
6.	Proof registration on Central Supply Database (Detailed report)
7.	Letter of approval by the Executive Authority to do business if the entity has a member(s) who is / are Government employees
8.	Bidders who submit information that is fraudulent, factually untrue or inaccurate will be disqualified.

6.1(B): PROFESSIONAL MANDATORY REQUIREMENTS

DESCRIPTION	COMPLY	DO NOT COMPLY
<u>Membership with professional associations</u> Audit assignments are to be performed using the appointed firm's audit approach/methodology which should be in line with the Code of Conduct; and the Professional Standards set by the professional associations mentioned below. Therefore, valid registration and proof of membership with the respective associations must be provided, for each respective discipline.		
<u>Internal Audit Assurance Services</u> Proof of membership with IIA must be provided for the proposed ▪ Audit Manager; and ▪ Engagement Director.		
<u>Information, Communications and Technology Services</u> Proof of membership with ISACA /or IIA /or EC Council must be provided for the proposed ▪ ICT Audit Manager; and ▪ Engagement Director		
<u>Financial Statements Review</u> Proof of membership with SAICA or other equivalent institutions must be provided for the proposed ▪ Project Manager; and ▪ Project Director Other equivalent professional bodies include: ▪ South African Institute of Public Accountants (SAIPA) ▪ Association of Chartered Certified Accountants (ACCA) ▪ Institute of Administration and Commerce of South Africa (IAC) ▪ The Chartered Association of Certified Accountants (CACA) ▪ CFA Society South Africa ((CFA)(SA)) ▪ The South African Institute for Business Accountants (SAIBA) ▪ Independent Regulatory Body of Auditors (IRBA)		

6.2 FUNCTIONALITY EVALUATION

- a) Responsive bids will first be evaluated on functionality and that bidders who score **70 points or more of the 100 points** will be evaluated further on price and Specific Goals.
- b) Bidders who score less than the **minimum threshold of 70 points** will automatically be disqualified.

The evaluation in respect of each of the criteria are as follows:

DESCRIPTION OF CRITERIA	METHOD OF EVALUATION	POINTS ALLOCATION
<u>1. Company Experience</u> Bidders must demonstrate relevant and verifiable experience in the provision of internal audit services within the public sector and/or to State-Owned Entities (SOEs). Attach Appointment letter(s) and reference letters/letters of Completion. Letters must be aligned to the client portfolio, and must indicate the following: 1. Client's company letterhead; 2. Client's contact details; 3. Description and timing/duration of work performed; and 4. Client signature.	No reference letters	0
	1-3 reference letters	15
	4-6 reference letters	20
	More than 6 reference letters	25
<u>2. Experience of Experience of Proposed Key Personnel</u> Service Providers must demonstrate that they possess relevant competencies to successfully provide the required services. Attach a concise CV (for the Audit Manager and the Engagement Director) NB: Audit Manager = Most Senior Consultant / Lead Auditor responsible for carrying out the audit engagement, with relevant experience in conducting internal audits. Engagement Director = The Senior Director /or Senior Manager responsible to oversee and sign-off on the overall audit engagement, with relevant experience in conducting internal audits.	Below 3 years • Audit Manager (0) • Engagement Director (0)	0
	3-5 Years • Audit Manager (5) • Engagement Director (5)	10
	6 -10 Years • Audit Manager (10) • Engagement Director (10)	20
	Above 10 years • Engagement Director (15) • Audit Manager (15)	30
<u>3. Academic and Professional Qualifications of Key Personnel</u>	No qualifications	0

Service Providers must demonstrate that they possess the relevant qualifications to execute required services Attach certified copies of relevant academic and professional qualifications.	Diploma/B. Degree in Auditing/ Auditing/Commerce/Accounting or equivalent • Audit Manager (5) • Engagement Director (5)	10
	Post-graduate degree in Auditing/ Commerce/Accounting or equivalent • Audit Manager (10) • Engagement Director (10)	20
	Certified Internal Auditor • Audit Manager (15) • Engagement Director (15)	30
<u>4. Methodology, Approach and Organisational Capacity</u> The bidders must demonstrate understanding of the category tendered for, assignment planning and execution, quality assurance, reporting, resource allocation and organisational capacity. NB: Include Organogram	Methodologies and Capabilities will be evaluated as follows: ▪ No methodology and approach - 0 ▪ Methodology and approach in place for 1 out of the 3 scoped services – (5) ▪ Methodology and approach in place for 2 out of the 3 scoped services – (10) Methodology and approach in place for 3 out of the 3 scoped services – (15)	15
Total		100
Minimum score for functionality		70

Evidence to Support Functionality Points allocation

- Relevant reference letters aligned to the service category/categories tendered for.
- Concise CVs for proposed key personnel.
- Certified copies of relevant qualifications, as required by the bid.
- Proof of relevant professional certifications/memberships, as required by the bid.
- A methodology and approach covering the service categories tendered for.
- An organisational structure (**Organogram**) and resource plan showing capacity to execute assignments.

6.3 PRICE AND SPECIFIC GOALS

The **80/20 preference point system** shall be applied for the purpose of this bid, as per the requirements of the *Preferential Procurement regulations, 2022*

Criteria	Points
Points on Price	80
Specific Goals	20
TOTAL	100

The 80/20 preference point system for acquisition of services, works or goods up to the Rand value of R50 Million (VAT inclusive):

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

P_s = Points scored for price of tender under consideration

P_t = Price of tender under consideration

$P_{\min}$ = Price of the lowest acceptable tender

A maximum of 20 points can be awarded to a tenderer for the specific goals specified for the tender.

The points scored for the specific goals will be added to the points scored for price.

POINTS AWARDED FOR SPECIFIC GOAL(S)

IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

Bidders must submit **relevant evidentiary documentation**, as specified in the tender, to support each claim.

Complete below and Refer to attached: SBD 6.1 – Preference Points (Specific Goals)

(Specify your claim on HDI, youth, women, disability and SMME's goals)

	POINTS
PRICE	80
SPECIFIC GOALS	
Enterprise owned by Black people	4
Enterprise owned by Women	4
Enterprise owned by Youth	4
Enterprise owned by Disabled	4
Enterprise owned by SMME's-QSE and EME	4
Total points for Price and SPECIFIC GOALS	100

PRICING SCHEDULE

Bidders must include a detailed pricing schedule demonstrating all items considered/included in the price, rates per unit and total costs, as well as value-added tax where applicable.

NOTE: The pricing submitted in this schedule will be used solely for **evaluation purposes** and shall not constitute a guarantee of any volume of work, expenditure or allocation of assignments to the appointed service providers.

PERSONNEL CATEGORY	UNIT	HOURLY RATE	DAILY RATE (8 Hours)
Engagement / Project Director	Hour and Day	R	R
Senior Manager / Engagement Manager	Hour and Day	R	R
Audit / Project Manager	Hour and Day	R	R
Senior Consultant / Auditor / Specialist	Hour and Day	R	R
Junior Consultant / Auditor	Hour and Day	R	R
Escalation rate: Year 2 (%)		%	%
YEAR 2			
Engagement / Project Director	Hour and Day	R	R
Senior Manager / Engagement Manager	Hour and Day	R	R
Audit / Project Manager	Hour and Day	R	R
Senior Consultant / Auditor / Specialist	Hour and Day	R	R
Junior Consultant / Auditor	Hour and Day	R	R
Escalation rate: Year 3 (%)		%	%
YEAR 3			
Engagement / Project Director	Hour and Day	R	R
Senior Manager / Engagement Manager	Hour and Day	R	R
Audit / Project Manager	Hour and Day	R	R
Senior Consultant / Auditor / Specialist	Hour and Day	R	R
Junior Consultant / Auditor	Hour and Day	R	R

Subtotal (Excl. VAT): R _____

VAT (if applicable): R _____

Total Amount (Incl. VAT): R _____

Actual services and related fees will be determined in accordance with the applicable scope of work, the terms and conditions of the contract.

7. CONFIDENTIALITY

This bid and all information in connection therewith shall be held in strict confidence by interested parties and usage of such information shall be limited to preparation of the bid.

8. ENQUIRIES

Enquiries related to this bid may be addressed via email on or before **02 NOVEMBER 2026**.

All supply Chain Management enquiries must be directed to:

Supply Chain Management Unit:

Mr. Sibusiso Lekhuleni

TEL: +27 13 492 5818

EMAIL: scm@mega.gov.za

All Technical or Project related enquiries must be directed to:

Internal audit:

Ms. Fikile Nyathi

TEL: +27 13 492 5818

EMAIL: fikile.nyathi@mega.gov.za

9. CLOSING DATE AND TIME

Time: **12h00** pm South African Time (GMT +2.00)

Date: **12 NOVEMBER 2026**

10. METHOD AND PLACE OF SUBMISSION

All the Bid documents together with the supporting documents must be submitted on sealed envelope, marked with the Name of bidder, Bid number, Bid description and closing date and be deposited in the tender box as per closing date and time per bid above. The address is as follows:

MEGA Head Office

02 Eastern Boulevard, Riverside

Mbombela

1200

All bidders are requested to submit the documents in two [2] formats, namely, one [1] original and [1] Copy on USB

BID VALIDITY PERIOD

Bids submitted shall remain valid for a period of **one hundred and twenty (120) days** from the closing date of the bid.

BIDDER'S DISCLOSURE**1. PURPOSE OF THE FORM**

- 1.1 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, 1996 (Constitution), and further expressed in the various applicable legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.
- 1.2 If a person is 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. DECLARATION ON EMPLOYMENT BY ORGAN OF STATE

- 2.1 Is the bidder, or any of the directors / trustees / shareholders / members / partners of the bidder employed by an organ of state, as defined in section 239 of the Constitution? **YES/NO**
- 2.2 If YES, furnish particulars of the names, individual identity numbers, in the table below:

Full Name	Identity Number	Name of organ of state

- 2.3 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**
- 2.3.1 If so, furnish particulars:

.....

- 2.4 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**

- 2.4.1 If so, indicate all companies registered in the CSD in the table below:

Supplier registration number (MAAA)	Status (active/inactive/deleted)

Failure to disclose all CSD-registered active companies linked to all Directors will lead to disqualification.

3 GENERAL DECLARATION

I,, the undersigned, 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 to be false.
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor.
- 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 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, 1998 (Act No. 89 of 1998) and or may be referred to law enforcement agencies for criminal investigation and or may be restricted from conducting business with the state for a period not exceeding 10 years in terms of the Prevention and Combating of Corrupt Activities Act, 2004 (Act No. 12 of 2004) or any other applicable legislation.

I CERTIFY THAT THE ABOVE IS CORRECT.

I ACCEPT THAT THE PROCURING INSTITUTION MAY REJECT THE BID OR TAKE APPROPRIATE ACTION AGAINST ME IF THIS DECLARATION IS FALSE.

.....
Signature

.....
Date

.....
Designation

.....
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

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	
Enterprise owned by Black people	4
Enterprise owned by Women	4
Enterprise owned by Youth	4
Enterprise owned by Disabled	4
Enterprise owned by SMME's-QSE and EME	4
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:

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

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:

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

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 (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)
Enterprise owned by Black people	N/A	4	N/A	
Enterprise owned by Women	N/A	4	N/A	
Enterprise owned by Youth	N/A	4	N/A	
Enterprise owned by Disabled	N/A	4	N/A	
Enterprise owned by SMME's-QSE and EME	N/A	4	N/A	

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:	
	
	
	