



**TERMS OF REFERENCE: REQUEST FOR QUOTATION FOR THE APPOINTMENT OF AN ACCREDITED SERVICE PROVIDER TO PROVIDE TRAINING FOR X10 TOUR OPERATORS ACROSS ALL 5 REGIONS TO BE TRAINED ON BUSINESS DEVELOPMENT INTERVENTIONS THROUGH THE UPSKILLING PROGRAM, INCLUDING THE COACHING, MENTORING AND TRACKING THEIR BUSINESS IMPACT TO BE HELD FROM OCTOBER - JANUARY 2026.**

**REFERENCE NUMBER: GTA/RFQ/2025/42**

**Released: 24 OCTOBER 2025**

**Submissions Close: 31 OCTOBER 2025**

**CLOSING TIME 16H00 pm**

**Queries be directed to:**

Ms. Magugu Mlangeni

Supply Chain Management

[Bids@gauteng.net](mailto:Bids@gauteng.net)

**Submissions must be e-mailed to:**

Ms. Magugu Mlangeni

Supply Chain Management

[Bids@gauteng.net](mailto:Bids@gauteng.net)

## **1. INVITATION**

- 1.1 Gauteng Tourism Authority (GTA) hereby invite an accredited Service providers, with relevant and appropriate skills and experience to submit proposals to Gauteng Tourism Authority to provide training for x10 Tour Operators across all 5 regions to be trained on Business Development Interventions through the Upskilling Program, including the Coaching, Mentoring and Tracking their Business Impact; to be held from October - January 2026, trained in the current financial year 2025/26FY.
- 1.2 Training of x10 Tour Operators.
- 1.3 To procure Venue Hire and Catering for the training to be held in Johannesburg.

## **2. BACKGROUND**

- 2.1 In recent years, the tourism sector has recognized the critical role that Small, Medium, and Micro Enterprises (SMMEs) play in driving economic growth and creating jobs. As a result, various initiatives have been implemented to support and develop SMME tour operators, particularly in enhancing their business insight and operational efficiency.
- 2.2 Business development interventions tailored for tourism-focused SMMEs aim to provide essential skills and knowledge that contribute to their growth and sustainability. These interventions often include training on professional packaging of tourism products, effective costing strategies, and the establishment of lucrative business deals. By equipping tour operators with these skills, the initiatives aim to foster a more competitive and resilient tourism sector.
- 2.3 A significant number of SMME tour operators have participated in these training programs, such as Destination Management Companies (DMC), resulting in measurable improvements in their business practices. The ongoing support and development of these enterprises are vital for ensuring the long-term viability of the tourism industry, contributing to broader economic development goals, and promoting sustainable tourism practices.

## **3. SCOPE OF WORK/DELIVERIES**

### **3.1 The service provider will be required to deliver the following**

- 3.1.1 This project aims to source and appoint a specialist/s in the area of Tour operators program who will assist the Gauteng-based Tour Operators SMME on business development interventions through the upskilling program.
- 3.1.2 The training programs are to be designed to address specific challenges faced by SMME tour operators, such as limited access to market information, insufficient understanding of pricing strategies, and the lack of professional branding. By focusing on these areas, the interventions not only enhance the operational capabilities of the tour operators but also improve their ability to attract and retain customers in an increasingly competitive market.
- 3.1.3 Through continued investment in training and development, the tourism sector can empower SMME tour operators to thrive, ultimately benefiting local economies and communities.

### **3.2 To effectively enhance the business growth and sustainability of SMME tour operators.**

**A comprehensive training program should encompass the following key areas:**

- Professional Packaging of Tourism Products

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- Costing and Pricing Strategies
- Marketing and Promotion
- Customer Service Excellence
- Business Negotiation Skills
- Financial Management
- Sustainability Practices
- Legal and Regulatory Compliance
- Networking and Partnerships

### 3.3 **3-5 days detailed Workshop leading to Certification.**

3.4 After completing the final training, SMMEs should receive Mentoring and Coaching support for a period of 1 to 3 months. This support should include tracking their progress and documenting the impact and business opportunities arising from the Tour Operators' Business Development Intervention training during the current fiscal year, 2025/26fy.

### 3.5 **Procurement of Venue hire and Catering for 15 people**

- Venue around Johannesburg.
- English Breakfast - (Eggs, Bread, Bacon, Sausages, Mushroom, Tomato, Beans or Savory means) Tea, Coffee, and Juice.
- Lunch - x2 Starch, x2 Veggies, Beef and Chicken and x1 soft drink per person.
- A Bottle of Water must be provided during the session (1 bottle per person).

### 3.6 **Training venue (Classroom style)**

- Overhead Projector.
- Clipboard or flipchart and Penflex (marker).
- Visual & Audio system (microphone).
- Notebooks and pens.
- Uninterrupted Wi-Fi connection for the duration of the training.

### 3.7 **Portfolio of Evidence (POEs) -The following documents need to be submitted after the whole training**

- Training Manual (10 Learners)
- Original Attendance Registers
- Close out Report
- Accredited SETA Certificate upon completion of the training (10 Learners).

## **4. REQUIRED EXPERTISE OF A SERVICE PROVIDER**

4.1 The project requires competence and qualifications for the project in terms of detailed skills and experience. To provide training, the service provider must be able to demonstrate measurable success and relevant expertise in carrying out accredited training and be able to link tourism objectives and deliveries within the Tour Operators on business development interventions.

- The project requires an experienced service provider capable of communicating effectively.
- Demonstrate experience in developing training programs/courses.
- Extensive experience in skills development and training.

## 5. MANDATORY ADMINISTRATIVE COMPLIANCE DOCUMENT

- 5.1 **Minimum of one (01) Traceable Reference letter** of recommendation from previous clients and must be related to the required services training. The letters must be on the company letterhead, signed and dated with contactable details.

## 6. FORMAL PRICE QUOTATION\*

- 6.1 The formal all-inclusive quotation (**Inclusive of VAT**) should indicate the total costs that will be charged for the execution of the project.

## 7. PROPOSAL SUBMISSION

- 7.1 Formal detailed Quotation (**Inclusive of VAT**) should be accompanied by the following documents:

### **MANDATORY ADMINISTRATIVE COMPLIANCE DOCUMENTS (NB: FAILURE TO SUBMIT THE FOLLOWING DOCUMENTS WILL RESULT IN DISQUALIFICATION).**

- **SBD 4** - Declaration of Interest Form (**Bidder's Disclosure**).
- **Minimum of one (01) Traceable Reference letter** of recommendation from previous clients and must be related to the required services training. The letters must be on the company letterhead, signed and dated with contactable details.

### **NON - MANDATORY ADMINISTRATIVE COMPLIANCE DOCUMENTS (NB: FAILURE TO SUBMIT THE FOLLOWING DOCUMENTS WILL NOT RESULT IN DISQUALIFICATION)**

- SBD 1 – Invitation to Bid
- SBD 6.1 - Preferential Procurement Regulations 2022
- SARS PIN
- BBBEE Certificate / Affidavit signed by the deponent and stamped by the Commissioner of oath.
- CSD Report
- Business Profile
- Identity document / Valid B-BBEE certificate / CSD Report

## 8. INVOICES

- a. Payments will be made against the delivered goods / services.
- b. Invoices must indicate the task and/or output and should include a short description of goods delivered.
- c. The GTA pays for work completed to the satisfaction of the agency. No upfront payments are made for work not yet done.
- d. Please note that the payment can only be processed upon receipt of the following document:
  - Invoice
  - Statement reflecting the outstanding amount.
  - Proof of bank confirmation letter
- e. All the required documents for payment and queries should be directed to the Finance central invoice email to [GTA.Invoices@gauteng.net](mailto:GTA.Invoices@gauteng.net)

## 9. CRITERIA FOR EVALUATION OF PROPOSALS

9.1 Criteria for evaluation are as follows:

- a) The service provider will be appointed in terms of the Preferential Procurement Regulations (2022).
- b) The proposal will be evaluated using the 80/20 preferential system wherein 80 represents price and 20 for specific goals.

**Specific goals for this RFQ and points claimed are indicated per the table below.**

| SPECIFIC GOAL/S                                                                                 | EVIDENCE REQUIRED TO EARN POINTS                          | TOTAL POINTS ALLOCATION |
|-------------------------------------------------------------------------------------------------|-----------------------------------------------------------|-------------------------|
| SMME (QSE / EME)                                                                                | Valid B-BBEE certificate / Sworn Affidavit / CSD Report   | 10                      |
| Historically Disadvantaged individuals: <ul style="list-style-type: none"><li>• Women</li></ul> | Identity document / Valid B-BBEE certificate / CSD Report | 10                      |
| <b>TOTAL POINTS =</b>                                                                           |                                                           | <b>20</b>               |

- c) **FAILURE ON THE PART OF A TENDERER TO SUBMIT SBD 6.1 AND 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.**
- d) This RFQ is subject to the National Treasury General Conditions of Contract.

## 10. RULES OF BIDDING

- a) The rules of bidding for this assignment are as follows:
- a) The GTA reserves the right to withdraw or amend these terms of reference by notice in writing to all parties who have received the terms of reference before the closing date.
- b) The GTA reserves the right to negotiate prices with the preferred / recommended bidder.
- c) The GTA reserves the right not to appoint any service provider if the received proposals do not match its requirements.
- d) Service providers may ask for clarification via email on these terms of reference or any of its annexures up to 48 hours before the deadline for the submission of the bids.
- e) Any request for clarification must be submitted by email at [Bids@gauteng.net](mailto:Bids@gauteng.net) and answers will be emailed to all service providers that require any clarity.
- f) The GTA reserves the right **NOT** to make an appointment for this project.
- g) The cost of preparing and submitting bids by prospective suppliers will be at the cost of the prospective supplier.
- h) The validity of the received bids shall be ninety (90) days.
- i) The recommended bidder must be registered on the National Treasury Central Supplier Database before appointment.
- j) **No late submission will be considered after closing date and time.**
- k) For Brand name items specified in bid/quotation specification document, the bidders can quote on similar / Equivalent items.

## PART A

## INVITATION TO BID

|                                                                                                                                                                                                                            |                                                                                                                                                                                                                                                                                                                                                      |  |                                                                   |                               |                                                                                                      |                      |          |                                                          |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|-------------------------------------------------------------------|-------------------------------|------------------------------------------------------------------------------------------------------|----------------------|----------|----------------------------------------------------------|
| <b>BID NUMBER:</b>                                                                                                                                                                                                         | GTA/RFQ/2025/42                                                                                                                                                                                                                                                                                                                                      |  | <b>CLOSING DATE:</b>                                              | 31 OCTOBER 2025               |                                                                                                      | <b>CLOSING TIME:</b> | 16H00 pm |                                                          |
| <b>DESCRIPTION</b>                                                                                                                                                                                                         | REQUEST FOR QUOTATION FOR THE FOR THE APPOINTMENT OF AN ACCREDITED SERVICE PROVIDER TO PROVIDE TRAINING FOR X10 TOUR OPERATORS ACROSS ALL 5 REGIONS TO BE TRAINED ON BUSINESS DEVELOPMENT INTERVENTIONS THROUGH THE UPSKILLING PROGRAM, INCLUDING THE COACHING, MENTORING AND TRACKING THEIR BUSINESS IMPACT TO BE HELD FROM OCTOBER - JANUARY 2026. |  |                                                                   |                               |                                                                                                      |                      |          |                                                          |
| <b>BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)</b>                                                                                                                                 |                                                                                                                                                                                                                                                                                                                                                      |  |                                                                   |                               |                                                                                                      |                      |          |                                                          |
| Submissions must be emailed to <a href="mailto:Bids@gauteng.net">Bids@gauteng.net</a><br>No late submission will be considered after closing date and time.                                                                |                                                                                                                                                                                                                                                                                                                                                      |  |                                                                   |                               |                                                                                                      |                      |          |                                                          |
| <b>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO</b>                                                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                      |  |                                                                   |                               | <b>TECHNICAL ENQUIRIES MAY BE DIRECTED TO:</b>                                                       |                      |          |                                                          |
| CONTACT PERSON                                                                                                                                                                                                             | Magugu Mlangeni                                                                                                                                                                                                                                                                                                                                      |  |                                                                   | CONTACT PERSON                | Magugu Mlangeni                                                                                      |                      |          |                                                          |
| TELEPHONE NUMBER                                                                                                                                                                                                           | 011 085 2523                                                                                                                                                                                                                                                                                                                                         |  |                                                                   | TELEPHONE NUMBER              | 011 085 2523                                                                                         |                      |          |                                                          |
| FACSIMILE NUMBER                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                      |  |                                                                   | FACSIMILE NUMBER              |                                                                                                      |                      |          |                                                          |
| E-MAIL ADDRESS                                                                                                                                                                                                             | <a href="mailto:Bids@gauteng.net">Bids@gauteng.net</a>                                                                                                                                                                                                                                                                                               |  |                                                                   | E-MAIL ADDRESS                | <a href="mailto:Bids@gauteng.net">Bids@gauteng.net</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<br>[IF YES ENCLOSE PROOF]                                                                                                                                                                                                                                                                   |  | ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED? |                               | <input type="checkbox"/> Yes <input type="checkbox"/> No<br>[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.**

**SIGNATURE OF BIDDER:**

.....

**CAPACITY UNDER WHICH THIS BID IS SIGNED:**

.....

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

**DATE:**

.....

## 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**

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.

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<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.
- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

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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.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

|           |                |
|-----------|----------------|
| .....     | .....          |
| Signature | Date           |
| .....     | .....          |
| Position  | Name of bidder |

## PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

**NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022**

### 1. GENERAL CONDITIONS

- 1.1 The following preference point systems are applicable to invitations to tender:
- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
  - the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

#### 1.2 To be completed by the organ of state

- a) The applicable preference point system for this tender is the **80/20** preference point system.

- 1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:
- (a) Price; and
  - (b) Specific Goals.

#### 1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

|                                                  | POINTS     |
|--------------------------------------------------|------------|
| PRICE                                            | 80         |
| SPECIFIC GOALS                                   | 20         |
| <b>Total points for Price and SPECIFIC GOALS</b> | <b>100</b> |

- 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:

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

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:

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

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmax = Price of highest acceptable tender

#### 4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
  - (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system, then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

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

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

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

| The specific goals allocated points in terms of this tender | Number of points allocated (80/20 system) (To be completed by the organ of state) | Number of points claimed (80/20 system) (To be completed by the tenderer) |
|-------------------------------------------------------------|-----------------------------------------------------------------------------------|---------------------------------------------------------------------------|
| SMME (QSE / EME)                                            | 10                                                                                |                                                                           |
| Women                                                       | 10                                                                                |                                                                           |
| <b>TOTAL POINTS =</b>                                       | <b>20</b>                                                                         |                                                                           |

#### 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

TERMS OF REFERENCE: REQUEST FOR QUOTATION FOR THE APPOINTMENT OF AN ACCREDITED SERVICE PROVIDER TO PROVIDE TRAINING FOR X10 TOUR OPERATORS ACROSS ALL 5 REGIONS TO BE TRAINED ON BUSINESS DEVELOPMENT INTERVENTIONS THROUGH THE UPSKILLING PROGRAM, INCLUDING THE COACHING, MENTORING AND TRACKING THEIR BUSINESS IMPACT TO BE HELD FROM OCTOBER - JANUARY 2026.

- ☐ 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.

|                                                                                                                                                                  |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>.....</p> <p><b>SIGNATURE(S) OF TENDERER(S)</b></p> <p><b>SURNAME AND NAME:</b> .....</p> <p><b>DATE:</b> .....</p> <p><b>ADDRESS:</b> .....</p> <p>.....</p> |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------|