



TERMS OF REFERENCE FOR:

**THE APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT A GAUTENG TOURISM BRAND
SURVEY STUDY**

REFERENCE NUMBER: GTA/RFQ/2026/83

Released Date : 20 March 2026

Submissions Close: 07 April 2026

BEFORE 16H00PM

Queries be directed to:

Ms. Phakama Majola
Supply Chain Management
Bids@gauteng.net

Submissions must be e-mailed to:

Ms. Phakama Majola
Supply Chain Management
Bids@gauteng.net

1. INVITATION

- 1.1 The Gauteng Tourism Authority (GTA) hereby invites qualified and experienced service providers to submit proposals to conduct a Gauteng Tourism brand survey study.

2. BACKGROUND AND CONTEXT

2.1 The Gauteng Tourism Authority (GTA) is a public entity of the Gauteng Provincial Government mandated to promote, market, manage, and develop tourism within the Gauteng City Region. In fulfilling its mandate, GTA is required to implement evidence-based planning, monitoring, evaluation, and reporting systems that demonstrate the effectiveness, relevance, and impact of its destination branding and marketing interventions.

2.2 Brand strength, perception, awareness, and consideration are critical drivers of tourism demand and destination competitiveness. Accordingly, GTA requires a scientifically robust and methodologically sound Brand Survey Study to generate credible and reliable data that will support:

- Strategic decision-making;
- Monitoring of brand performance over time;
- Evaluation of destination branding and marketing interventions; and
- Compliance with provincial and national monitoring, evaluation, and reporting frameworks.

2.3 Brand perception and destination image play a central role in influencing travel decision-making across both leisure and business tourism markets. Positive brand awareness, trust, and differentiation directly affect visitation, length of stay, visitor spend, and repeat travel. As such, strengthening and managing the Gauteng tourism brand is a strategic priority for enhancing the province's tourism performance and broader economic impact.

2.4 As the custodian of tourism promotion, marketing, and destination development in Gauteng, GTA is responsible for positioning and managing the Gauteng destination brand in a manner that supports inclusive economic growth, job creation, revenue generation, and transformation within the tourism value chain. The effectiveness of these branding and

marketing interventions must therefore be measured through credible, evidence-based monitoring and evaluation processes.

- 2.5 GTA therefore invites suitably qualified and experienced service providers to submit proposals to conduct a comprehensive Gauteng tourism brand survey study aligned to government monitoring and evaluation requirements.

3. RATIONALE FOR THE BRAND SURVEY STUDY

- 3.1 Despite ongoing destination marketing and brand promotion initiatives, there is a need for a structured, empirical assessment of the performance of the Gauteng tourism brand across priority domestic and international markets. A brand survey study provides a systematic mechanism to assess how Gauteng is perceived, recognised, and considered as a tourism destination, and whether current branding efforts are translating into desired behavioural outcomes such as intention to visit, recommendation, and repeat travel.

- 3.2 Tourism demand is influenced by a range of brand-related factors, including awareness, associations, credibility, and perceived value. Visitor expenditure linked to tourism activity contributes directly to the local economy through spending on accommodation, transport, food and beverage, attractions, and retail, with further indirect and induced impacts across the tourism value chain. Strengthening the Gauteng tourism brand is therefore a key driver of increased tourism volumes, spend, geographic spread, seasonality management, and socio-economic benefits.

- 3.3 A comprehensive brand survey study will enable GTA to assess whether its destination branding and marketing initiatives are achieving their intended objectives and to identify areas where strategic repositioning or refinement may be required.

4. STRATEGIC ALIGNMENT

- 4.1 The Gauteng tourism brand is implemented through a range of marketing, communication, and destination promotion initiatives aligned to provincial tourism strategies and broader government priorities. These interventions are intended to support, amongst others:
 - Growth in domestic and international tourist arrivals;

- Increased tourism spend and length of stay;
- Job creation and economic inclusion;
- Market diversification; and
- Transformation and participation of SMMEs and previously disadvantaged individuals within the tourism sector.

4.2 The brand survey study will provide evidence to assess the extent to which these strategic objectives are being supported through brand performance and market perception outcomes.

5. MONITORING, EVALUATION AND EVIDENCE REQUIREMENTS

5.1 Effective monitoring and evaluation of destination branding interventions requires consistent, standardised, and repeatable approaches to data collection and analysis. A scientifically sound brand survey enables the establishment of baseline measures, trend analysis, and comparability over time, thereby strengthening evidence-based planning and reporting.

5.2 The study will support the development of standardised brand performance indicators that can be integrated into GTA's monitoring, evaluation, and reporting framework, ensuring alignment with government performance management and accountability requirements. This approach will also promote knowledge sharing, learning, and continuous improvement in destination brand management.

6. INSTITUTIONAL ROLE AND GOVERNANCE

6.1 Given the cross-cutting nature of destination branding and its link to tourism policy, economic development, and investment attraction, studies of this nature are appropriately managed by a destination marketing and management organisation. As the mandated authority, GTA is best positioned to ensure that brand performance outcomes are accurately attributed to tourism strategies and interventions, while taking into account broader market and environmental factors.

6.2 The Gauteng Tourism Brand Survey Study will therefore provide GTA with a credible evidence base to assess the contribution of its branding and marketing initiatives to tourism growth, economic impact, transformation, and the overall development objectives of the Gauteng City Region.

7. PURPOSE OF THE ASSIGNMENT

7.1 The purpose of this assignment is to appoint a service provider to design and implement a Gauteng Tourism Brand Survey Study that will:

- Measure the performance of the Gauteng tourism brand across identified priority markets;
- Generate reliable, comparable, and repeatable brand performance indicators;
- Provide empirical evidence to support GTA's monitoring, evaluation, and reporting processes; and
- Enable trend analysis over time.

8. OBJECTIVES OF THE ASSIGNMENT

8.1 The specific objectives of the assignment are to:

- Assess awareness, familiarity, and perceptions of the Gauteng tourism brand across identified target markets;
- Measure brand equity dimensions, including (but not limited to):
 - Brand awareness;
 - Brand associations and attributes;
 - Brand consideration and preference;
 - Brand trust and credibility;
 - Brand advocacy and intent to visit;
- Evaluate the effectiveness of GTA's destination branding and marketing initiatives;
- Provide disaggregated insights across market segments (e.g. domestic vs international, leisure vs business tourism, demographics, geographic origin);
- Develop a set of standardised brand performance indicators aligned to GTA's performance reporting and monitoring and evaluation; and
- Produce evidence-based recommendations to strengthen destination branding and marketing strategies.

9. SCOPE OF WORK

9.1 The appointed service provider will be expected to undertake the following tasks:

9.1.1 Inception Phase

- Review relevant GTA strategic, marketing, planning and monitoring and evaluation documents;
- Engage GTA relevant officials to confirm study objectives, scope, and reporting requirements;
- Develop and submit a detailed inception report outlining:
 - Methodology;
 - Sampling framework;
 - Data collection instruments;
 - Workplan and timelines; and
 - Risk management approach.

9.1.2 Research Design and Methodology

- Design a robust, statistically valid research methodology suitable for tourism brand measurement;
- Propose appropriate quantitative and/or qualitative approaches;
- Ensure methodological alignment with best practice destination branding, strategic planning and M&E standards;
- Design survey instruments that enable longitudinal tracking and comparability over time.

9.1.3 Data Collection

- Implement data collection across agreed target markets and segments;
- Ensure ethical research practices and data integrity;
- Apply quality control measures to ensure reliability and validity of data.

9.1.4 Data Analysis and Interpretation

- Analyse data using appropriate analytical tools and techniques;
- Develop brand performance indices and dashboards where applicable;
- Interpret findings in relation to GTA's strategic objectives and market positioning.

9.1.5 Reporting and Knowledge Products

- Produce a comprehensive Brand Survey Report including:
 - Executive summary;
 - Methodology;
 - Key findings;
 - Brand performance analysis;
 - Market segmentation insights;
 - Trends and comparative analysis (where applicable);
 - Strategic recommendations;
- Prepare a presentation suitable for Executive Management and Board reporting;
- Provide data outputs that can be integrated into GTA's MER and performance reporting systems.

10. DELIVERABLES

10.1 The service provider will be required to deliver, at minimum, the following:

- Inception Report;
- Approved research methodology and survey instruments;
- Cleaned and validated dataset (raw and analysed);
- Gauteng Tourism Brand Survey Report;
- Executive presentation (PowerPoint);
- Brand performance indicators aligned to GTA's MER framework.

N.B: Failure to provide a quotation with a breakdown of the deliverables may result in the disqualification of the bid.

11. DURATION OF THE ASSIGNMENT

11.1 The assignment is expected to be completed within a period of weeks/ months from the date of appointment. A detailed project plan with milestones must be provided as part of the proposal.

12. SERVICE PROVIDER REQUIREMENTS

12.1 Bidders must demonstrate:

- Proven experience in conducting brand, perception, or destination marketing research;
- Experience working with public sector entities or tourism authorities;
- Demonstrated expertise in research design, statistical analysis, strategic planning and M&E;
- A multidisciplinary team with relevant qualifications in marketing, tourism, economics or social sciences and statistics;
- Ability to deliver high-quality analytical and policy-relevant reports.

13. GOVERNANCE AND REPORTING

13.1 The service provider will report to a designated GTA Project Manager. All deliverables will be subject to review and approval by GTA. Ownership of all data, reports, and outputs shall vest with GTA.

14. CONFIDENTIALITY AND DATA OWNERSHIP

14.1 All information, data, and materials produced under this assignment shall be treated as confidential and may not be used or disclosed without prior written consent from GTA.

15. EVALUATION CRITERIA

15.1 Proposals will be evaluated in accordance with applicable procurement legislation and GTA supply chain management policies, based on:

- Technical approach and methodology;
- Relevant experience and capability;
- Qualifications and experience of the project team;
- Project plan and timelines;

- Price and value for money.

16. SUBMISSION REQUIREMENTS

16.1 Interested service providers must submit:

- A technical proposal;
- A financial proposal;
- Company profile and relevant experience;
- CVs of key personnel;
- Proof of compliance with statutory and regulatory requirements.

17. FORMAL PRICE QUOTATION

17.1 The formal all-inclusive quotation (inclusive of VAT) should indicate the total costs that will be charged for the execution of the above deliverables including the management and printing fees.

18. PROPOSAL SUBMISSION

18.1 Formal quotations (**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

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 / Sworn Affidavit signed by the deponent and stamped by the Commissioner of oath
- CSD Report
- Business Profile
- Identity Document

19. FUNCTIONALITY CRITERIA

FUNCTIONALITY CRITERIA		TOTAL POINTS
<p>Important notes to the bidder:</p> <ul style="list-style-type: none"> • The proposal will be evaluated in three (3) sections. • Each of the three sections has an individual score. • The three sections give a total of 100 • The three sections are as follows: <ul style="list-style-type: none"> ○ Section 1: Public sector experience of the service provider with a total score of 10 ○ Section 2: Experience of key personnel who form part of the team with a total score of 40 ○ Section 3: Methodology with a total score of 50 		
SECTION 1: PUBLIC SECTOR EXPERIENCE		10
<p>Important notes to the bidder:</p> <ul style="list-style-type: none"> • Public sector experience must be aligned to similar work, which have been successfully concluded in the last six years. • A section in the proposal must outline the public sector experience, including the date and the scope of work that was conducted, as well as the entity/ client for which the work was undertaken. (Failure to outline this will result in no points being awarded). • The maximum points a bidder can score in this section is 10 points and the lowest score a bidder can score in this section is zero points. 		
<p>PUBLIC SECTOR EXPERIENCE</p> <ul style="list-style-type: none"> ○ 1- 3 years' experience is 3 points ○ 4 – 5 years' experience is 5 points ○ > 6 years' experience is 10 points 		

SECTION 2: EXPERIENCE OF KEY PERSONNEL WHO FORM PART OF THE TEAM		
<p>Important notes to the bidder:</p> <p>This section will be scored as follows:</p> <p>For the project team, the points in the section will be scored as follows:</p> <ul style="list-style-type: none"> • A section in the proposal must outline the area of expertise of the project team within the field of Project Management, Strategic Planning and business planning, Evaluation Studies and Research including their model development, Strategic Planning. These must be clearly outlined in the proposal. 		40
		40

<ul style="list-style-type: none"> • Number of years in the fields identified above must be clearly indicated. • The maximum points a bidder can score in this section is 40 points 		
<p>Project Management</p> <ul style="list-style-type: none"> ○ >3< 6 years' experience, is 5 points ○ > 7 < 10 years' experience, is 6 points ○ > 10 years' experience, is 10 points 	10	
<p>Research, evaluation studies including their relevant models</p> <ul style="list-style-type: none"> ○ >3< 6 years' experience, is 10 points ○ > 7 < 10 years' experience, is 15 points ○ > 10 years' experience, is 20 points 	20	
<p>Strategic Planning and business planning</p> <ul style="list-style-type: none"> ○ >3< 6 years' experience, is 5 points ○ > 7 < 10 years' experience, is 6 points ○ > 10 years' experience, is 10 points 	10	
SECTION 3: METHODOLOGY		
<p>Important notes to the bidder:</p> <ol style="list-style-type: none"> 1. This sub-section will focus on how the bidder will approach the scope of work, that is, who will do what by when? How will the proposed methodology achieve the scope of work and the expected deliverables and outputs? 2. The bid submission must include a clear and detailed methodology that presents: <ol style="list-style-type: none"> 2.1. Well-defined chronological sequence of methodology techniques and their activities involved in executing the scope of work outlined in this TORs document. 2.2. All these activities must have completion dates. 2.3. These activities must translate to the required deliverables as detailed this TORs document. 3. This aspect of the methodology carries a total of 50 points. If a bidder meets all three requirements as set out in the bullet points above (2.1. – 2.3) a full score will be given. 2.1. worth 40 points, 2.2. worth 3 points, and 2.3 worth 7 points. 4. The service provider must demonstrate their understanding on core concepts above and how to apply the same in the required study/ survey. 5. The maximum points a bidder can score in this sub-section is 50 points 	50	50

Expected Scores

A bidder that fails to obtain at least **75 points** will not be considered for further evaluation in stage 2 (Price and Specific Goals).

20. INVOICES

- 20.1 Payments will be made against the delivered goods / services.
- 20.2 Invoices must indicate the task and/or output and should include a short description of goods delivered.
- 20.3 The GTA pays for work completed to the satisfaction of the agency. No upfront payments are made for work not yet done.
- 20.4 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
- 20.5 All the required documents for payment and queries should be directed to the Finance central invoice email to GTA.Invoices@gauteng.net

21. CRITERIA FOR EVALUATION OF PROPOSALS

21.1 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 GOAL/S	EVIDENCE REQUIRED TO EARN POINTS	TOTAL POINTS ALLOCATION
Historically Disadvantaged individuals: <ul style="list-style-type: none">• Women = 10• Youth = 10	Identity document / Valid B-BBEE certificate / CSD Report	20
TOTAL POINTS		20

- 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.

22. RULES OF BIDDING

22.1 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 proposals received do not match its requirements.
- d) Service providers may ask for clarification via email on these terms of reference or any of their 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 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 awarded service provide may be required to sign a service level agreement with the GTA.
- j) The recommended bidder must be registered on the National Treasury Central Supplier Database before appointment.
- k) The GTA reserves the right to request additional information / clarification during the evaluation process.
- l) **N.B: NO LATE SUBMISSIONS WILL BE CONSIDERED AFTER THE CLOSING DATE AND TIME.**

**PART A
INVITATION TO BID**

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)					
BID NUMBER:	GTA/RFQ/2026/83	CLOSING DATE:	07-April-2026	CLOSING TIME:	16H00PM
DESCRIPTION	CONDUCT A GAUTENG TOURISM BRAND SURVEY STUDY				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
Bids@gauteng.net					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Phakama Majola		CONTACT PERSON	Alecia Langton	
TELEPHONE NUMBER			TELEPHONE NUMBER		
FACSIMILE NUMBER			FACSIMILE NUMBER		
E-MAIL ADDRESS	Bids@gauteng.net		E-MAIL ADDRESS	Alecia@gauteng.net	
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?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]	
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS					
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	
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:
<p>1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.</p> <p>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.</p> <p>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.</p> <p>1.4. THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).</p>
2. TAX COMPLIANCE REQUIREMENTS
<p>2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.</p> <p>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.</p> <p>2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.</p> <p>2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.</p> <p>2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.</p> <p>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.</p> <p>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."</p>

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 interest¹ in the enterprise, employed by the state? **YES/NO**

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

Full Name	Identity Number	Name of State institution

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

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

2.2.1 If so, furnish particulars:

.....
.....

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

2.3.1 If so, furnish particulars:

.....
.....

3 DECLARATION

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

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars 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.

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.

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

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

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN

TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON

PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN

MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE

FALSE.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

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

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

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

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 To be completed by the organ of state

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

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price; and
(b) Specific Goals.

1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	100

1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

- 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:

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

Where

- Ps = Points scored for price of tender under consideration
Pt = Price of tender under consideration
Pmin = Price of lowest acceptable tender

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

3.2.1. **POINTS AWARDED FOR PRICE**

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

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

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 (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Historically Disadvantaged individuals: <ul style="list-style-type: none"> • Women = 10 • Youth = 10 	20	
TOTAL POINTS =	20	

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:

