



## SOUTH AFRICAN TOURISM

## PART C: - TENDER EVALUATION PROCESS - SAT TENDER 255/24 - BRAND EXPERIENTIAL AGENCY FOR AFRICA CEL HUBS

Summary of the Evaluation Phases (table below):

**Table 1: Evaluation Summary**

| Phase 1<br>Administrative and<br>Mandatory bid<br>requirements      | Phase 2<br>Desktop Functional Technical Evaluation                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Phase 3<br>Price and Specific Goals<br>Evaluation                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|---------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Bidders' responses will be evaluated based on Table 2 below.</p> | <p>Desktop Functional Technical Evaluation is divided into two (2) phases, desktop technical functionality and pitch presentation, with a weighting of 100% for each phase.</p> <ol style="list-style-type: none"> <li>1. Phase 2A: Desktop technical functional evaluation on 100% (maximum threshold): <ul style="list-style-type: none"> <li>• A bidder must meet a minimum threshold of <b>70%</b> or above on the desktop technical functional evaluation to be considered in the next evaluation phase, Phase 2B (Pitch Presentation).</li> <li>• Failure to meet the minimum threshold will result in disqualification in this phase.</li> </ul> </li> <li>2. Phase 2B Pitch Presentation = 100% (maximum threshold): <ul style="list-style-type: none"> <li>• The pitch presentation will be based on the Phase 2b evaluation criteria.</li> <li>• A bidder must meet a minimum threshold of 70% or above on the pitch presentation evaluation to be considered for Phase 3 (Price and Specific goals Evaluation).</li> <li>• Failure to meet the minimum threshold will result in disqualification in this phase.</li> </ul> </li> </ol> <p><b>NB: Bidders should reference the criteria to the portfolio of evidence in the bid proposal</b></p> | <p>Service provider(s) who achieved a minimum threshold of 70% on phase 2 will be evaluated on the 80/20 or 90/10 preference points system.</p> <p>Once a tender is received, the lowest acceptable tender will be used to determine the preference point system to be used for the evaluation. Where the lowest acceptable tender is below R50 million, the 80/20 preference point system must be used and If the lowest acceptable tender is above R50 million, the 90/10 preference point system must be used.</p> |

#### Phase 1: Administrative and mandatory bid requirements

All documents must be completed and signed by the duly authorised representative of the prospective bidder(s). During this phase, bidders' responses will be evaluated based on compliance with the listed administrative and mandatory bid requirements.

**Table 2: Phase 1 Evaluation**

| The documents that must be submitted                                                      | YES/NO | Non-submission may result in disqualification.                                                                                                                                                                                                                                                                                                                                                                                                      |
|-------------------------------------------------------------------------------------------|--------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Confirmation of valid Tax Status                                                          |        | Written confirmation that the relevant government tax authority may, on an ongoing basis during the tenure of the contract, disclose the bidder's tax compliance status.                                                                                                                                                                                                                                                                            |
| B - BBEE Certificate 1. Only applicable to SA bidders.                                    |        | B - BBEE Certificate or, for companies that have less than R10 million turnover, a sworn affidavit is required. A copy of the template for this affidavit is available on the Department of Trade and Industry website<br><a href="https://www.thedti.gov.za/gazette/Affidavit_EME.pdf">https://www.thedti.gov.za/gazette/Affidavit_EME.pdf</a> (Failure to submit a sworn affidavit will result in non-compliance on the preference points system) |
| Annexure A-Invitation (SBD 1)                                                             |        | Complete, initialize each page, and sign the Standard Bidding Document (SBD)                                                                                                                                                                                                                                                                                                                                                                        |
| Annexure B-Registration on Central Supplier Database (CSD). Only applicable to SA bidders |        | All agencies, including proposed partner/subcontractor agencies must be registered as service providers on the National Treasury's Central Supplier Database (CSD). If you are not registered, proceed to complete the registration of your company before submitting your proposal. Visit <a href="https://secure.csd.gov.za/">https://secure.csd.gov.za/</a> to obtain your vendor number. Submit proof of registration.                          |
| Annexure E-Declaration of Interest - SBD 4)                                               |        | Complete, initialize each page, and sign the SBD                                                                                                                                                                                                                                                                                                                                                                                                    |

**Phase 2: Desktop Functional Technical Evaluation is divided into two (2) phases, desktop technical functionality and pitch presentation, with the weighting of 100% for each phase.**

All bidders are required to respond to the technical evaluation criteria scorecard and provide information/portfolio of evidence that they unconditionally hold the available capacity, ability, experience, and qualified staff to provide the requisite business requirements to South African Tourism under this tender.

Bidders will be required to achieve a minimum threshold of **70%** in each of the phases to proceed to Phase 3 for Price and Preference (B-BBEE) Evaluation.

The technical functional evaluation (functionality) will comprise two (2) phases:

**Phase 2A: Desktop technical functional evaluation-** A bidder will be evaluated out of 100% and is required to score a minimum threshold of **70%** to qualify for Phase 2 B (Pitch Presentation).

**Phase 2B: Pitch Presentation** - Bidders will be evaluated out of 100% and are required to score a minimum threshold of **70%** to be evaluated further in Phase 3 (Price and Preference (B-BBEE) Evaluation).

**Table 3: Phase 1 - Mandatory Requirements**

| The documents that must be submitted                                   | YES/NO | Non-submission may result in disqualification.                                                                                                                                                                                                          |
|------------------------------------------------------------------------|--------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Confirmation that the bidder has a presence in the Africa CEL markets. |        | Written confirmation proof that the bidder can execute work in all the Africa CEL markets. These include and are not limited to partner/affiliate offices, office addresses, company registrations, and, where applicable, partnership agreements, etc. |

**Table 4: Phase 2A Desktop Functional Evaluation**

| Phase 2A- Desktop Technical Evaluation Criteria                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Weight Allocated | Reference pages in the bidder's proposal. |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|-------------------------------------------|
| <b>Evaluation criteria</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                  |                                           |
| <p><b>Company Expertise and Experience in localising Brand Communications and Experiential Activations:</b></p> <p>Illustrate your experience per the RFP scope of work conducted by your company previously on the African continent. In doing so, please provide us with the following elements:</p> <ul style="list-style-type: none"> <li>• 2 different case studies you have implemented that are not older than the last five years.</li> <li>• Those selected case studies should illustrate the business challenge, the solution you implemented, and performance reporting on them.</li> <li>• 2 written and contactable client reference letters per the selected case studies.</li> </ul> <p>• All elements provided = 1 point<br/> • All elements provide a clear linkage to our RFP = 2 points<br/> • All the elements, clear linkage, awards and accolades = 3 points</p> | 45               |                                           |
| <p><b>Project Management and Synergistic Collaboration Sourcing</b></p> <p>Please provide us with the following elements:</p> <ul style="list-style-type: none"> <li>• Illustrate what is your project's management approach;</li> <li>• Provide synergistic collaborations that you could source for SAT.</li> <li>• What project management tools are used for account management?</li> </ul> <p>1 element = 1 point<br/> 2 elements = 2 points<br/> All elements = 3 points</p>                                                                                                                                                                                                                                                                                                                                                                                                      | 20               |                                           |
| <p><b>Experience of Service Team:</b></p> <p>Illustrate how experienced your personnel knowledge is within the African Continent and provide us with details of applicable noteworthy credentials and their profiles relating to brand communication, experiential activations, and account management.</p> <p>3 experienced members of the team with profiles= 1 point<br/> 4 - 8 experienced members of the team with profiles = 2 points<br/> More than 8 experienced members of the team with profiles = 3 points</p>                                                                                                                                                                                                                                                                                                                                                               | 20               |                                           |

|                                                                                                                                                                                                                                                                                    |            |  |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|--|
| <b>Agency and Resources Fee Structure.</b><br><br>Based on the highlighted case study, please show the optimal usage of the allocated budget and how you designed your project fee structure.<br>This will be evaluated using the Functional Evaluation Matrix outlined on Table 6 | 15         |  |
| <b>PHASE 2.A TOTAL</b>                                                                                                                                                                                                                                                             | <b>100</b> |  |

**Table 5: Phase 2B Desktop Functional Evaluation**

| Phase 2B- Pitch Presentation Evaluation Criteria                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Weight Allocated | Reference pages in the bidder's proposal. |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|-------------------------------------------|
| <b>Evaluation criteria</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                  |                                           |
| <p><b>Develop a 360-degree localised brand communication strategy that addresses the destination brands' challenges, business objectives, and brand goals.</b></p> <p><b><u>Deliverables:</u></b></p> <ul style="list-style-type: none"> <li>Using the SA Tourism global communication strategy, develop an integrated localised brand communications strategy for the African markets.</li> <li>Creatively develop an experiential marketing big idea and how that can be deployed, showcasing a cohesive thread in all the brand activation projects</li> </ul> <p><b><u>Expectations:</u></b></p> <ul style="list-style-type: none"> <li><i>Demonstrate the idea by using the following projects as examples:</i> <ol style="list-style-type: none"> <li><i>B2B Corporate Activation: Networking Event</i></li> <li><i>B2C Influencer/Content Creator Brand Experiential</i></li> <li><i>Destination Travel Expo (i.e. Magical Kenya Travel Expo or Sanganai Tourism Expo)</i></li> </ol> </li> </ul> | 50               |                                           |

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |     |  |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|--|
| <p><b>Implementation and management of activations - project management approach and reporting.</b></p> <p><u><b>Deliverables:</b></u></p> <ul style="list-style-type: none"> <li>• Illustrate how you would manage one of the projects.</li> <li>• Sample reporting based on your strategy, implementation and tactics.</li> </ul> <p><u><b>Expectations:</b></u></p> <ul style="list-style-type: none"> <li>• <i>Sample of managing briefs and reverts with timelines (leave behind document)</i></li> <li>• <i>Provide an example of a detailed activation recon</i></li> <li>• <i>Suggest success metrics and benchmark those against global best practise.</i></li> </ul> | 20  |  |
| <p><b>Expertise, experience and account management and team.</b></p> <p><u><b>Deliverable:</b></u></p> <ul style="list-style-type: none"> <li>• Organogram and process to demonstrate how the SAT account will be managed</li> </ul> <p><u><b>Expectations:</b></u></p> <ul style="list-style-type: none"> <li>• <i>A sample of back-of-house processes with agency in-market partners/affiliates. This is to be highlighted during the pitch presentation and included in a detailed document as a leave-behind.</i></li> <li>• <i>Agency ecosystem (including agency partners/affiliates in the Africa CEL markets).</i></li> </ul>                                          | 15  |  |
| <p><b>Proposed cost structure/model</b></p> <p><u><b>Deliverables:</b></u></p> <ul style="list-style-type: none"> <li>• Propose a costing model based on the pitch presentation.</li> </ul> <p><u><b>Expectations:</b></u></p> <ul style="list-style-type: none"> <li>• <i>No retainer models</i></li> </ul>                                                                                                                                                                                                                                                                                                                                                                   | 15  |  |
| <b>PHASE 2B TOTAL</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | 100 |  |

The bid evaluation committee will have the opportunity to ask questions and make notes of what they consider to be gaps in the proposals compared with how well the business requirements are satisfied.

- Bids proposals will be evaluated strictly according to the bid evaluation criteria stipulated in this section.
- Bidders must, as part of their bid documents, submit supportive documentation for all functional requirements as indicated in the terms of reference. The panel responsible for scoring the respective bids will evaluate and score all bids based on information presented in the bid proposals in line with the RFP.

- The score for functionality will be calculated in terms of the table below where each Bid Evaluation Committee (BEC) member will rate each criterion on the bid evaluation score sheet using the following value scale/matrix:

**Table 6: Functional Evaluation Matrix**

| Rating              | Definition                                                                                                                                                                                                                                                                                                                                                  | Score    |
|---------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|
| <b>Excellent</b>    | <b>Exceeds</b> the requirement. Exceptional demonstration by the supplier of the relevant ability, understanding, experience, skills, resources, and quality measures required to provide the goods/services. Response identifies factors that will offer potential value, with supporting evidence.                                                        | <b>3</b> |
| <b>Acceptable</b>   | <b>Satisfies</b> the requirement with <b>minor additional benefits</b> , above average demonstration by the supplier of the relevant ability, understanding, experience, skills, resources, and quality measures required to provide the goods/services. Response identifies factors that will offer potential required services, with supporting evidence. | <b>2</b> |
| <b>Average</b>      | Submission meets the minimum requirement with <b>major reservations</b> . Considerable reservations of the supplier's relevant ability, understanding, experience, skills, resources, and quality measures required to provide the goods/services, with little or no supporting evidence.                                                                   | <b>1</b> |
| <b>Unacceptable</b> | <b>Does not meet the requirement</b> . Does not comply and/or insufficient information provided to demonstrate that the supplier has the ability, understanding, experience, skills, resources & quality measures required to provide the goods/services, with little or no supporting evidence.                                                            | <b>0</b> |

**Phase 3: Price and Preference (specific goals) Evaluation (80/20) or (90/10) = 100 points**

**Table 7: Resource Rate Card**

Below is a list of Mandatory Resources.

**Note:** Please take note that you must write the appropriate position next to the resources we provided if your company's designations differ from those of the listed resources.

| Designation                    | Corresponding Roles/Titles | Service provided | Hourly Rate | Daily Rate | Hours Scoped per project |
|--------------------------------|----------------------------|------------------|-------------|------------|--------------------------|
| Executive Director             |                            | Account          |             |            |                          |
| Business Unit Account Director |                            | Account          |             |            |                          |
| Account Manager                |                            | Account          |             |            |                          |
| Strategic Director             |                            | Strategy         |             |            |                          |
| Creative Director              |                            | Creative         |             |            |                          |
| Art Director                   |                            | Creative         |             |            |                          |
| Copywriter                     |                            | Creative         |             |            |                          |
| Activations Manager            |                            | On-site          |             |            |                          |
| Branding Manager               |                            | On-site          |             |            |                          |
| Project Manager                |                            | Production       |             |            |                          |

Only Bidders who meet the minimum 70% threshold of functionality in Phase 2B will be evaluated in Phase 3: Price and Specific Goals Evaluation.

- Failure to meet the minimum threshold during Phase 2B the bidder will not qualify for Phase 3.

- SA Tourism will consolidate the total points for price evaluation (out of 80/20 or 90/10) and the total points for specific goals evaluation (out of 20/10). The bidder who scores the highest points for comparative pricing and specific goals status level of contributor after the consolidation of points will normally be considered the preferred bidder with whom South African Tourism will enter into further negotiations.
- Upon the successful negotiation and signing of a contract and services level agreement with the preferred bidder, all other bidders will be considered unsuccessful.

Table 8: Price and Preference (specific goals)

|                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                   |            |           |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|-----------|
| <b>1. LIST OF RETURNABLES</b>                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                   |            |           |
| <b>BIDDERS SHOULD PLEASE ADHERE TO THE FOLLOWING INSTRUCTIONS</b>                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                   |            |           |
| a) TICK APPLICABLE BOX                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                   |            |           |
| b) ENSURE THAT THE FOLLOWING DOCUMENTS ARE COMPLETED, SUBMITTED AND SIGNED WHERE APPLICABLE                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                   |            |           |
| <b>ANNEXURES</b>                                                                                                            | <b>DOCUMENT DESCRIPTION</b>                                                                                                                                                                                                                                                                                                                                                                                                       | <b>YES</b> | <b>NO</b> |
| <b>PART A &amp; B</b>                                                                                                       | IS BID INVITATION FORM, TERMS, AND CONDITIONS FOR BIDDING COMPLETED, SIGNED, AND SUBMITTED?                                                                                                                                                                                                                                                                                                                                       |            |           |
| <b>SUPPLIER IS REQUIRED TO USE THE PRESCRIBED SEQUENCE IN ATTACHING THE ANNEXURES THAT COMPLETE THE BID OR RFQ DOCUMENT</b> |                                                                                                                                                                                                                                                                                                                                                                                                                                   |            |           |
| <b>ANNEXURE A</b>                                                                                                           | IS THE STANDARD BID DOCUMENT (SBD4) FORM BIDDER'S DISCLOSURE COMPLETED, SIGNED AND SUBMITTED?                                                                                                                                                                                                                                                                                                                                     |            |           |
| <b>ANNEXURE B</b>                                                                                                           | IS BIDDER'S SWORN AFFIDAVIT - EXEMPTED MICRO ENTERPRISE (EME) - OR QUALIFYING SMALL ENTERPRISE (QSE) - STILL VALID (FOR A PERIOD OF 12 MONTHS) FROM THE DATE SIGNED BY COMMISSIONER SUBMITTED TO CLAIM POINTS FOR SMME'S?                                                                                                                                                                                                         |            |           |
| <b>ANNEXURE C</b>                                                                                                           | IS THE BIDDER'S QUOTED PRICE OR FINANCIAL OFFER SUBMITTED AND ALIGNED WITH THE SCOPE OF WORK? OR STATED IN THE BELOW TABLE OF DESCRIPTION OF SERVICE/GOODS?                                                                                                                                                                                                                                                                       |            |           |
| <b>ANNEXURE D</b>                                                                                                           | IS PROOF OF OWNERSHIP BY BLACK WOMAN ATTACHED IN THE FORM OF (A) COPY OF THE FOUNDING DOCUMENTATION OF THE COMPANY WITH WHICH THE OWNERSHIP IS LISTED, (B) COPY OF THE ID-DOCUMENT(S) OF THE BLACK WOMAN(E)                                                                                                                                                                                                                       |            |           |
| <b>ANNEXURE E</b>                                                                                                           | IS PROOF OF OWNERSHIP BY BLACK PERSON (S) IN THE FORM OF, (A) COPY OF THE FOUNDING DOCUMENTATION OF THE COMPANY WITH WHICH THE BLACK OWNERSHIP IS LISTED, AND (B) COPY OF IDENTITY DOCUMENTS.                                                                                                                                                                                                                                     |            |           |
| <b>ANNEXURE F</b>                                                                                                           | IS PROOF OF OWNERSHIP BY BLACK YOUTH ATTACHED IN THE FORM OF (A) ) COPY OF THE FOUNDING DOCUMENTATION OF THE COMPANY WITH WHICH THE OWNERSHIP IS LISTED, (B) COPY OF THE ID-DOCUMENT(S) OF THE BLACK YOUTH.                                                                                                                                                                                                                       |            |           |
| <b>ANNEXURE G</b>                                                                                                           | IS THE LATEST REPORT FROM CENTRAL SUPPLIER DATABASE (CSD) SUBMITTED? THE REPORT WILL BE USED AMONGST OTHERS TO VERIFY TAX COMPLIANT AND BANKING DETAILS. TO FURTHER CONFIRM IF THE SHAREHOLDERS/DIRECTORS OF THE COMPANY ARE BLACK WOMEN, BLACK YOUTH OR BLACK-OWNED. INFORMATION AND DETAILS ON BLACK WOMEN, BLACK YOUTH AND BLACK OWNERSHIP SHOULD BE SIMILAR TO THE INFORMATION SUBMITTED ON ANNEXURES B, C, D, E AND F ABOVE. |            |           |

**2. APPLICATION OF PREFERENCE POINT SYSTEM****4.1 DEFINITIONS**

HISTORICALLY DISADVANTAGED INDIVIDUALS (HDI) IS DEFINED AS A SOUTH AFRICAN CITIZEN -

- a) WHO, DUE TO THE APARTHEID POLICY THAT WAS IN PLACE, HAD NO VOTING RIGHTS IN THE NATIONAL ELECTIONS PRIOR TO THE INTRODUCTION OF THE CONSTITUTION OF THE REPUBLIC OF SOUTH AFRICA, 1983 (ACT NO. 100 OF 1983) OR THE CONSTITUTION OF THE REPUBLIC OF SOUTH AFRICA, 1993 (ACT NO. 200 OF 1993) (*"THE INTERIM CONSTITUTION)* AND OR
- b) WHO IS A WOMAN AND/OR
- c) YOUTH

4.2 WITH THE UNDERSTANDING THAT ANY PERSON WHO RECEIVED SOUTH AFRICAN CITIZENSHIP ON OR BEFORE THE INTRODUCTION OF THE INTERIM CONSTITUTION, WILL NOT BE DEEMED TO BE HDI.

4.3 ANY REFERENCE TO WORDS "BID" OR "BIDDER" HEREIN AND/OR IN ANY OTHER DOCUMENTATION SHALL BE CONSTRUED TO HAVE THE SAME MEANING AS THE WORDS "TENDER" OR "TENDERER".

4.4 "A WOMAN" REFERS TO A FEMALE PERSON WHO IS A SOUTH AFRICAN CITIZEN

4.5 "HDI EQUITY OWNERSHIP" REFERS TO THE PERCENTAGE OF A PARTNERSHIP OR BUSINESS THAT IS OWNED BY INDIVIDUALS, OR IN THE CASE OF A COMPANY, THE PERCENTAGE OF SHARES WHICH IS OWNED BY INDIVIDUALS WHO ARE ACTIVELY INVOLVED IN THE MANAGEMENT DECISIONS AND DAY TO DAY OPERATIONAL ACTIVITIES OF THE COMPANY OR BUSINESS AND WHO EXERCISES CONTROL IN THE BUSINESS IN RELATION TO THEIR OWNERSHIP AT THE

CLOSE OF TENDER. WHERE INDIVIDUALS ARE NOT ACTIVELY INVOLVED IN THE MANAGEMENT AND DAY TO DAY OPERATIONAL ACTIVITIES OF THE BUSINESS AND WHO DOES NOT EXERCISE CONTROL IN RELATION TO THE PERCENTAGE OF THEIR OWNERSHIP, EQUITY OWNERSHIP POINTS CANNOT BE AWARDED.

- 4.6 “**BLACK PEOPLE**” IS A GENERIC TERM WHICH MEANS AFRICANS, COLOURED AND INDIANS WHO ARE CITIZENS OF THE RSA BY BIRTH OR DESCENT OR BY NATURALISATION BEFORE 27 APRIL 1994 OR AFTER.
- 4.7 “**SMALL ENTERPRISE**” MEANS A SEPARATE AND DISTINCT BUSINESS ENTITY, TOGETHER WITH ITS BRANCHES OR SUBSIDIARIES, IF ANY, INCLUDING COOPERATIVE ENTERPRISES, MANAGED BY ONE OWNER OR MORE PREDOMINANTLY CARRIED ON IN ANY SECTOR OR SUBSECTOR OF THE ECONOMY.
- 4.8 “**YOUTH**” IS A GENERIC TERM WHICH MEANS PERSONS BETWEEN 14 TO 35 YEARS OF AGE. (THE MAXIMUM AGE OF PERSON/DIRECTOR/SHAREHOLDER ETC MUST BE BELOW OR 35 YEARS ON OR BEFORE THE CLOSING DATE AND TIME OF THE RFQ)
- 4.9 “**EXEMPTED MICRO ENTERPRISE (EME)**” IN TERMS OF THE GENERIC CODES OF GOOD PRACTICE, IT REFERS TO AN ENTERPRISE WITH AN ANNUAL TOTAL REVENUE OF R 10 MILLION OR LESS.
- 4.10 “**QUALIFYING SMALL ENTERPRISE (QSE)**” IN TERMS OF THE GENERIC CODES OF GOOD PRACTICE, IT REFERS TO AN ENTERPRISE WITH AN ANNUAL TOTAL REVENUE OF BETWEEN R 10 MILLION AND R 50 MILLION
- 4.11 “**SPECIFIC GOALS**” REFERS TO CONTRACTING WITH PERSONS, OR CATEGORIES OF PERSONS, HISTORICALLY DISADVANTAGED BY UNFAIR DISCRIMINATION ON THE BASIS OF RACE, GENDER OR DISABILITY AND IMPLEMENTING PROGRAMME AS PUBLISHED IN THE GOVERNMENT GAZETTE NO. 16085 DATED 23 NOVEMBER 1994.

#### 4.1280 / 20 PREFERENCE POINT SYSTEM

TENDERERS WILL BE AWARDED POINTS AS FOLLOWS:

The points must be allocated and awarded as follows:

|      |                                     |             |
|------|-------------------------------------|-------------|
| i.   | Total Tendered Price                | : 80 points |
| ii.  | Black Women Ownership               | : 04 points |
| iii. | Black Ownership                     | : 10 points |
|      | <b>points)</b>                      |             |
| iv.  | Black Youth                         | : 02 points |
| v.   | Small, Medium and Micro Enterprises | : 04 points |

**Specific Goals (Maximum**

(SMME's)

**Total : 100 points**

- 4.13 THE POINTS SCORED FOR SPECIFIC GOALS WILL BE ADDED TO THE POINTS SCORED FOR PRICE AND THE TOTAL MUST BE ROUNDED OFF TO THE NEAREST 2 DECIMAL PLACES

#### 4.14 TENDER PRICE

THE FOLLOWING FORMULA WILL BE USED TO CALCULATE THE POINTS OUT OF 80 FOR PRICE IN RESPECT OF TENDER WITH A RAND VALUE NOT EXCEEDING R 50 MILLION (INCLUSIVE OF ALL APPLICABLE TAXES). THE LOWEST ACCEPTABLE TENDER MUST SCORE 80 POINTS FOR PRICE, AND OTHER TENDERS WHICH ARE HIGH IN PRICE MUST SCORE FEWER POINTS, ON PRO RATA BASIS.

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

WHERE -

PS = POINTS SCORED (AWARDED) FOR PRICE OF TENDER UNDER CONSIDERATION  
 PT = PRICE OF TENDER UNDER CONSIDERATION; AND  
 PMIN = PRICE OF THE LOWEST ACCEPTABLE TENDER

#### 4.15 SPECIFIC GOALS

##### 4.15.1 % OWNED BY PEOPLE WHO ARE BLACK WOMEN (WO)

A MAXIMUM OF FOUR (04) POINTS WILL BE AWARDED TO A TENDERER WHO IS A BLACK WOMAN. EQUITY OWNERSHIP FOR BLACK WOMEN WILL BE DETERMINED BY THE % OF THE ENTERPRISE OWNED BY SUCH A PERSON OR BY THE % OF SHARES OWNED BY MEMBER/S WHO ARE ACTIVELY INVOLVED IN THE DAY TO DAY MANAGEMENT OF THE COMPANY OR ENTERPRISE.

% OF ENTERPRISE OWNED BY BLACK WOMEN %

THUS, POINTS AWARDED:  $4 \times \frac{\% WO}{100} =$

PROOF OF OWNERSHIP MUST BE ATTACHED IN

THE FORM OF:

- a) COPY OF THE FOUNDING DOCUMENTATION OF THE COMPANY WITH WHICH THE OWNERSHIP IS LISTED I.E. CIPC ETC;
- b) COPY OF THE ID-DOCUMENT (S) OF THE BLACK WOMAN(E)
- c) LATEST CENTRAL SUPPLIER DATABASE (CSD) REPORT OF WHICH OWNERSHIP OF THE BLACK WOMAN IS LISTED

#### 4.15.2 % OWNED BY BLACK PEOPLE (BO)

A MAXIMUM OF TEN (10) POINTS WILL BE AWARDED TO A TENDERER WHO IS A BLACK AND DID NOT HAVE VOTING RIGHTS ACCORDING TO THE DEFINITION OF AN HDI. EQUITY OWNERSHIP FOR BLACKS WILL BE DETERMINED BY THE % OF THE ENTERPRISE OWNED BY SUCH A PERSON OR BY THE % OF SHARES OWNED BY MEMBERS WHO ARE ACTIVELY INVOLVED IN THE DAY TO DAY ACTIVITIES OF THE COMPANY OR ENTERPRISE.

% OF ENTERPRISE OWNED BY BLACK PERSON(S) WHO DID NOT HAVE VOTING RIGHTS... %

THUS, POINTS AWARDED:  $10 \times \frac{\% BO}{100} =$

PROOF OF OWNERSHIP MUST BE ATTACHED IN THE FORM OF:

- a) COPY OF ID DOCUMENT.
- b) COPY OF THE FOUNDING DOCUMENTATION ON THE COMPANY WITH WHICH THE OWNERSHIP IS LISTED I.E. CIPC ETC;
- c) LATEST CSD REPORT WITH BLACKS AS SHAREHOLDERS/DIRECTORS OF THE COMPANY

#### 4.15.3 SMALL, MEDIUM AND MICRO ENTERPRISES (SMME'S)

A MAXIMUM OF FOUR (4) POINTS WILL BE AWARDED TO A TENDERER WHO IS CLASSIFIED AS SMME

IS THE COMPANY CLASSIFIED AS EME OR QSE?

YES = 4 POINTS  =

NO = 0 POINT

PROOF OF DOCUMENTATION MUST BE ATTACHED IN THE FORM OF:

- a) SWORN AFFIDAVIT THAT IS VALID FOR A PERIOD OF 12 MONTHS FROM THE DATE SIGNED BY THE COMMISSIONER.

#### 4.15.4 % OWNED BY BLACK YOUTH

A MAXIMUM OF TWO (2) POINTS WILL BE AWARDED TO A TENDERER WHO IS Black Youth. EQUITY OWNERSHIP FOR BLACK YOUTH WILL BE DETERMINED BY THE % OF THE ENTERPRISE OWNED BY SUCH A PERSON OR BY THE % OF SHARES OWNED BY MEMBERS WHO ARE ACTIVELY INVOLVED IN THE DAY TO DAY ACTIVITIES OF THE COMPANY OR ENTERPRISE.

% OF ENTERPRISE OWNED BY BLACK YOUTH. %

THUS, POINTS AWARDED :  $2 \times \frac{\% DO}{100} =$

PROOF OF OWNERSHIP MUST BE ATTACHED IN THE FORM OF:

- a) A COPY OF THE FOUNDING DOCUMENTATION OF THE COMPANY WITH WHICH THE OWNERSHIP IS LISTED I.E. CIPC ETC;
- b) A COPY OF ID DOCUMENT;
- c) LATEST CENTRAL SUPPLIER DATABASE (CSD) REPORT OF WHICH OWNERSHIP OF THE BLACK YOUTH IS LISTED.

#### 4.15.5

**Table B: Ownership**

| NAME AND SURNAME /ENTITY NAME | GENDER (MALE OR FEMALE) | AGE i.e., 32 | CITIZENSHIP (RSA, OR SPECIFY OTHER) | ETHNIC GROUP (BLACK, WHITE, ETC.) | NUMBER OF SHARES PER SHAREHOLDER | PERCENTAGE OF OWNERSHIP (%) PER SHAREHOLDER |
|-------------------------------|-------------------------|--------------|-------------------------------------|-----------------------------------|----------------------------------|---------------------------------------------|
|-------------------------------|-------------------------|--------------|-------------------------------------|-----------------------------------|----------------------------------|---------------------------------------------|

| Ownership             | Total percentage of ownership | specific goals points claimed |
|-----------------------|-------------------------------|-------------------------------|
|                       |                               |                               |
| Black Woman ownership |                               |                               |
| Black Ownership       |                               |                               |
| Black Youth Ownership |                               |                               |
| Total                 |                               |                               |

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| Total |  |  |  |  |  |  |

(To be completed by bidder)

**TABLE- C: SPECIFIC GOALS**

4.16 THE SAT CAN ONLY AWARD POINTS PROVIDED SUFFICIENT INFORMATION AND REQUIRED DOCUMENTS ARE CORRECTLY COMPLETED AND RETURNED WITH THE PROPOSALS IN LINE WITH LIST OF RETURNABLE DOCUMENTS ON PARAGRAPH THREE (3) ABOVE. POINTS OBTAINED FOR PRICE SHOULD BE ADDED TO POINTS OBTAINED FOR SPECIFIC GOALS.

4.17 TENDER MUST BE AWARDED TO THE TENDERER SCORING THE HIGHEST POINTS. HOWEVER, A CONTRACT MAY BE AWARDED TO A TENDERER THAT DID NOT SCORE THE HIGHEST POINTS ONLY IN ACCORDANCE WITH SECTION 2 (1)(F) OF THE PPPFA 05 OF 2000.

**3. CRITERIA FOR BREAKING DEADLOCK IN SCORING**

- a) IF TWO OR MORE OF THE TENDERERS HAVE SCORED EQUAL TOTAL NUMBER OF POINTS, THE CONTRACT WILL BE AWARDED TO THE TENDERER THAT SCORED THE HIGHEST POINTS FOR SPECIFIC GOALS;
- b) IF TWO OR MORE TENDERS SCORE EQUAL TOTAL NUMBER OF POINTS IN ALL RESPECTS, THE AWARD WILL BE DECIDED BY THE DRAWING OF LOTS

**4. DELIVERIES**

- a. ALL DELIVERIES MAY BE ACCOMPANIED BY A DELIVERY NOTE OR AN INVOICE OF AN OFFICIAL PURCHASE ORDER NUMBER AGAINST WHICH THE DELIVERY HAS BEEN AFFECTED
- b. DELIVERIES NOT COMPLYING WITH THE PURCHASE ORDER FORM MAY BE RETURNED TO THE SUPPLIER(S) AT THE SUPPLIER'S EXPENSE. SAT WILL NOT BE LIABLE FOR PAYMENT OF INCORRECTLY DELIVERED GOODS OR SERVICE

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |  |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
| <p>c. BIDDERS SHOULD INDICATE THE PLANNED DELIVERY PERIOD (IN DAYS) FROM THE DATE AN ORDER IS ISSUED</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |  |
| <p><b>5. POPIA DISCLAIMER</b></p> <p><b>5.1. COMPLIANCE WITH THE PERSONAL INFORMATION ACT, 4 OF 2013</b><br/> PERSONAL INFORMATION SHARED WITH THE SAT SHALL BE TREATED WITH CONFIDENTIALITY AND IN COMPLIANCE WITH THE PROTECTION OF PERSONAL INFORMATION ACT, 4 OF 2013 (POPIA) AND OTHER APPLICABLE LAWS. FOR PURPOSES OF THIS DISCLAIMER, "PERSONAL INFORMATION" SHALL BE DEFINED AS DETAILED IN THE PROMOTION OF ACCESS TO INFORMATION ACT, ACT 2 OF 2000 (PAIA) AND POPIA, AND "PROCESSING" AND "FURTHER PROCESSING" SHALL BE READ, INTERPRETED AND UNDERSTOOD AS DETAILED AND DEFINED IN POPIA.</p> <p><b>5.2. CONSENT TO PROCESSING AND FURTHER PROCESSING OF PERSONAL INFORMATION</b><br/> THE SATMAY PROCESS AND FURTHER PROCESS RECEIVED PERSONAL INFORMATION, INTERNALLY OR EXTERNALLY, IN THE EXECUTION OF ITS MANDATE AND/OR AS REQUIRED BY LAW. THE SATMAY SHARE PERSONAL INFORMATION WITH ITS SERVICE PROVIDERS, AGENTS, CONTRACTORS, LEGAL AND OTHER PROFESSIONAL ADVISORS AUTHORISED TO PROCESS THIS INFORMATION. THE SATMAY THUS PLACE RECEIVED PERSONAL INFORMATION IN THE PUBLIC DOMAIN DUE TO THE NATURE AND REQUIREMENTS OF ITS WORK.</p> <p><b>5.3. FURTHER PROCESSING OF PERSONAL INFORMATION</b><br/> YOU FURTHER GRANT THE SATEXPRESS AND/OR IMPLIED PERMISSION TO FURTHER PROCESS RECEIVED PERSONAL INFORMATION AND PLACE IT IN THE PUBLIC DOMAIN, IN THE EXECUTION OF ITS MANDATE AND STATUTORY OBLIGATIONS.</p> <p><b>5.4. DUTY OF CARE</b><br/> THE SAT VALUES YOUR PRIVACY AND SHALL TAKE ALL REASONABLE MEASURES TO PROTECT RECEIVED PERSONAL INFORMATION.</p> <p><b>5.5. EXEMPTION FROM LIABILITY</b><br/> THE SAT(INCLUDING ITS OFFICIALS AND/OR EMPLOYEES) ACCEPTS NO LIABILITY WHATSOEVER, FOR ANY LOSS, DAMAGE (WHETHER DIRECT, INDIRECT, SPECIAL, OR CONSEQUENTIAL), AND/OR EXPENSES OF ANY NATURE WHATSOEVER WHICH MAY ARISE AS A RESULT OF, OR WHICH MAY BE ATTRIBUTABLE DIRECTLY OR INDIRECTLY, FROM INFORMATION MADE AVAILABLE HEREIN, OR ACTIONS OR TRANSACTIONS RESULTING THEREFROM</p> |  |

END