SOUTH AFRICAN TOURISM

PART C: TENDER EVALUATION PROCESS – SAT 358/26 TOURISM BRAND STRATEGY, DESIGN, ACTIVATION, PRODUCTION, DISTRIBUTION AND COLLECTION

Table 1: Summary of the Evaluation Phases

| Phase 1<br>Administrative requirements | Phase 2 A<br>Desktop Technical Evaluation Criteria. | Phase 2 B<br>Pitch Presentation. | Phase 3<br>Price and Specific Goals Evaluation |
|---|---|---|---|
| Bidders must complete and submit all administrative to proceed to phase 2 outlined under Table 2 below. | 1. Phase 2. A: Desktop technical functional evaluation = 100%<br>• A bidder must meet a minimum threshold of 70% of desktop technical functional evaluation to be considered for the next phase of evaluation, Phase 2B (Pitch Presentation).<br><br>Failure to meet the minimum threshold of 70% will result in disqualification in this Phase 2A. | 2. Phase 2. B Pitch Presentation= 100%<br>• A bidder must meet the minimum threshold of 70% of Phase 2B Pitch Presentation to be considered for the next phase of evaluation, Phase 3 (Price and Specific Goal evaluation).<br><br>Failure to meet the minimum threshold of 70% on Phase 2B will result in disqualification in this phase. | Service provider(s) who achieved a minimum threshold of 70% in phase 2B will be evaluated on the 80/20 or 90/10 preference points system/specific goals. |

Phase 1: Administrative 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 requirements. The bidder(s) proposal will be disqualified for non-submission of some or any of the documents.

Table 2: Administrative Requirements

| Document that must be submitted | YES/NO | Non-submission may result in disqualification. |
|---|---|---|
| Invitation SBD 1 | | Complete and sign where applicable. |

| Document that must be submitted | YES/NO | Non-submission may result in disqualification. |
|---|---|---|
| Registration on Central Supplier Database (CSD) | | • All bidders, including proposed partner/subcontractor agencies, must be registered as a service provider on the National Treasury's Central Supplier Database (CSD).<br>• If the bidder is not registered, register with your company before submitting your proposal. Visit https://secure.csd.gov.za/ to obtain your vendor number. Submit proof of registration. (Applicable to South African Companies only)<br>• Proof of registration can be in any form that SAT can verify that the bidder is registered on the CSD, e.g., MAAA number, CSD report, etc.<br>• Tax compliance is only considered when awarding the tender (the bidder), not during various evaluation phases.<br>• During the award phase, if a bidder is found to be non-compliant as per the CSD or SARS confirmation, the bidder must provide proof of compliance or written proof by SARS of their tax compliance status within seven working days, of which failure will result in the tender not being awarded to the bidder.<br>SAT reserves the right to consider the next bidder within the process. |
| Declaration of Interest – SBD 4 | | • Complete and sign where applicable.<br>If any bidder is found to have missed signing off or duly completed the SBD, SAT may require, within two working days, a sign-off or duly completed of the SBD, and failure will result in the bid being disqualified. |
| Preference points claim form in terms of the preferential procurement regulations 2022 - SBD 6.1 | | • Complete and sign where applicable.<br>If any bidder is found to have missed signing off or duly completed the SBD, SAT may require, within two working days, a sign-off or duly completed of the SBD, and failure will result in the bid being disqualified |

Phase 2: Technical Functional Evaluation Criteria = Weighting out of 100 basis points

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 are required to achieve a minimum threshold of 70% to proceed to phase 3: (Price and Specific goals).

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

Phase 2A will measure the responsiveness of proposals as per submission on or before the closing date and time of the bid, and Phase 2B will comprise of Pitch Evaluation

Desktop functional evaluation and pitch presentation.

1. Phase 2A Desktop functional evaluation - bidder must meet a minimum threshold of 70% of desktop technical functional evaluation to be considered for the next phase of evaluation, Phase 2B (Pitch Presentation). Failure to meet the minimum threshold of 70% will result in disqualification in this Phase 2A.
2. Phase 2B Pitch Presentation evaluation: bidder must meet the minimum threshold of 70% of Phase 2B pitch presentation to be considered for the next phase of evaluation, Phase 3 (Price and Specific Goal evaluation).

Failure to meet the minimum threshold of 70% on Phase 2B will result in disqualification in this phase.

Table 3: Desktop Functional Evaluation

| Deliverables / Performance Indicators | Weight Allocated | Reference pages in the bidder's proposal. |
|---|---|---|
| Evaluation criteria | | |
| Criteria 1: Company Experience Evaluation Criteria<br>Bidders must submit three (3) reference letters in total (one for each required component) demonstrating successful project execution.<br><br>Required Components<br>Each bidder must provide one reference letter per component:<br><br>• Component A: Brand Experiential Marketing<br>• Component B: End-to-End Manufacturing and Production<br>• Component C: System Integration and Reporting<br><br>Mandatory Reference Letter Requirements<br>To be accepted for scoring, every reference letter must meet all the following criteria:<br><br>A. Issued on the client's official letterhead<br>B. Signed by an authorized client representative<br>C. Include the date of successful project completion<br>D. State the project name<br>E. Provide valid client contact details<br>F. Be dated within the last three (3) years (not older than 3 years from the closing date of the tender)<br><br>Scoring Guidelines<br><br>3 points = The bidder submitted three reference letters covering all required components, and all letters strictly satisfy every mandatory requirement (A to F).<br><br>Zero scoring<br>- The bidder submitted fewer than three reference letters, provided letters outside the specified components, failed to meet the reference letter requirements, or submitted letters older than three years. | 20 | |

| Deliverables / Performance Indicators | Weight Allocated | Reference pages in the bidder's proposal. |
|---|---|---|
| Criteria 2: Expertise and experience of the proposed four resources:<br><br>The evaluation is based on the below (four) key roles.<br><br>NB: The bidder must demonstrate the relevant expertise and experience in Marketing. The proposed Four resources by submitting Curriculum Vitae (CVs) or detailed Profiles to support the years of experience for all key personnel areas of expertise ensuring that the resource is clearly linked to a specific role.<br><br>The bidder must demonstrate access to the following four key agency resources, supported by relevant CVs/ Detailed Profiles:<br><br>1. Project Manager<br>- Minimum 5 to 7 years of general project management experience, with at least 3 to 5 successfully delivered multi-disciplinary projects (involving events, activations, or complex commercial execution).<br>2. Experiential Creative / Brand Director<br>a) Minimum 5 years in experiential marketing, brand strategy, or creative direction, backed by a portfolio of at least 4 to 5 major brand activation or live campaign rollouts.<br>3. Production & Manufacturing Lead<br>a) Minimum 5 years in industrial manufacturing, event production, or custom fabrication, with a proven track record of overseeing at least 5 large-scale physical production and installation projects.<br>4. Technical Integration & Data Architect<br>a) Minimum 4 to 5 years in systems integration, software engineering, or data architecture, with experience successfully deploying at least 3 interactive technology or reporting platforms in live environments.<br>Matrix<br>3 points = The bidder submitted 4 CV or detail profiles with a minimum number of years as per the resources requirements and linking the submitted CV or Profiles with provided resources.<br>Zero Scoring:<br>- Less than 4 CV or Profiles submitted<br>- Not Linking submitted CV or Profiles with the provided resources<br>- Not Meeting the minimum years of Experience | 20 | |

| Deliverables / Performance Indicators | Weight Allocated | Reference pages in the bidder's proposal. |
|---|---|---|
| NB: The evaluation matrix is 3 and Zero | | |
| Criteria 3: Methodology, techniques, and project comprehensive approach to the end-to-end lifecycle of brand assets. The bidder must demonstrate a comprehensive end-to-end approach to the lifecycle management of brand assets, visibility, and production across three core pillars:<br><br>1. TGCSA Brand Merchandising & Plaque Lifecycle Management<br>a. Detailed workflow covering plaque design, production, distribution, and certified recycling of expired/deprecated plaques.<br>b. Multi-channel digital and physical production requirements, brand merchandising, activation, and accompanying content strategies.<br><br>2. Brand Experience & Global Trade Activation<br>a. End-to-end management of multi-channel collateral, digital assets, content creation, production, and branded toolkits.<br>b. Execution frameworks for experiential activation materials and global trade show/exhibition collateral.<br><br>3. Visitor Experience & Stakeholder Engagement<br>a. Digital and physical production of branding requirements for visitor touchpoints.<br>b. Management of collateral, experiential activation elements, recognition awards, certificates (e.g., Lilizela Tourism Awards), and training materials.<br><br>Points Allocation Matrix<br>• 3 Points: The bidder addresses and fully details all 3 requirements specified above, demonstrating a robust, comprehensive end-to-end methodology across merchandising, trade activations, and visitor experiences.<br><br>• 2 Points: The bidder addresses and details 2 of the requirements specified above, providing clear methodologies for those specific pillars.<br><br>• 1 Point: The bidder addresses and details 1 of the requirements specified above, with a clear outline limited to that single pillar.<br><br>• 0 Points: The bidder fails to submit any of the required methodologies or submits content that is irrelevant to the scope. | 20 | |
| Criteria 4: Courier Distribution and Collection Experience (Nationwide Footprint)<br><br>To ensure the successful service provider has the necessary logistics capacity to cover all nine provinces of South Africa within the required SLAs, bidders must meet the following evaluation criteria. This section carries a total score, evaluated on a 0 to 3 rating scale.<br><br>Bidders must submit the following documentary evidence in their proposal:<br><br>• Proof of Courier Capacity: | 20 | |

| Deliverables / Performance Indicators | Weight Allocated | Reference pages in the bidder's proposal. |
|---|---|---|
| a) If executing in-house, submission of company-owned fleet vehicle registrations, tracking system infrastructure, and a dedicated logistics team organizational chart.<br>b) If subcontracting, a signed, valid Service Level Agreement (SLA) or Memorandum of Understanding (MOU) between the main bidder and a registered, accredited courier service provider, accompanied by the subcontractor's company profile and transport licenses.<br>• Geographical Reach Evidence (Track Record):<br>b) Submission of three (3) traceable reference letters from previous or current clients demonstrating that the main bidder (or their designated courier partner) has successfully managed and executed bulk distribution and collection services across all nine (9) provinces of South Africa simultaneously. Reference letters must explicitly state the geographical coverage and volume of deliveries handled.<br>Scoring Grid (Rating Scale: 0 to 3)<br>3 points: Valid proof of in-house courier capability or a formal, signed subcontractor agreement is provided.<br>• All three (3) reference letters are provided, explicitly confirming successful distribution and collection operations across all 9 provinces of South Africa with positive performance feedback.<br>2 points: Valid proof of in-house courier capability or a formal, signed subcontractor agreement is provided. Reference letters are provided but cover between 6 to 8 provinces rather than a full nationwide footprint or lack specific detail on collection logistics.<br>1 point: Valid proof of in-house courier capability or a formal, signed subcontractor agreement is provided. Reference letters provided cover fewer than 6 provinces or fail to demonstrate verifiable nationwide logistics experience.<br>Zero scoring:<br>- Incomplete proof of courier partnership or missing subcontracting agreement.<br>- Reference letters provided cover fewer than 6 provinces or fail to demonstrate verifiable nationwide logistics experience.<br>- No In house courier or signed subcontracting agreement | | |
| Criteria 5: Brand Experience & Global Trade Activations (One Case Study)<br>The bidder must submit relevant, verifiable case study (completed within the last 5 years, i.e., 2022 September onwards) demonstrating past performance in executing brand experiences and global trade activations. The submitted case study will be evaluated based on the following components:<br>1. Original Business Challenge or Objective | 15 | |

| Deliverables / Performance Indicators | Weight Allocated | Reference pages in the bidder's proposal. |
|---|---|---|
| - Clear articulation of the client's initial problem, market context, strategic objective, or brand risk that necessitated the activation.<br><br>2. Solution Implemented (Concept & Mechanics)<br><br>- Detailed breakdown of the creative concept, experiential mechanics, multi-channel collateral toolkits, and production methods deployed to address the challenge.<br><br>3. Detailed Implementation Process<br><br>- Step-by-step overview of project execution, management of stakeholder/trade platforms, logistics, and adherence to timelines and brand standards.<br><br>4. Performance Reporting & ROI<br><br>- Measurable results, key performance indicators (KPIs), return on investment (ROI), and success demonstrated against the original objectives.<br><br>5. Verifiable Client References<br>- Provision of valid, reachable contact details (name, designation, email, date of the project and signed) for the client referenced in the case study to enable verification of services rendered.<br><br>Points Allocation Matrix (0 to 3 Rating Scale)<br><br>• 3 Points:<br><br>- The bidder submits complete, highly detailed case studies within the 5-year timeframe that thoroughly cover all required elements (Business Challenge, Solution/Concept, Implementation Process, Performance/ROI, and Verifiable Contacts).<br>- Results are clearly quantified, highly relevant to global trade and brand activations, and backed by verifiable client references.<br><br>• 2 Points:<br>- The bidder submits a case study within the required timeframe that covers most of the elements, but with minor gaps or light detail in either the implementation process, performance reporting, or quantifiable ROI metrics. All vital references are provided.<br>• 1 Point:<br>- The bidder submits case studies that touch on only one or two required components (e.g., describing the concept without detailing the implementation process, ROI, or performance metrics) or lacks complete verification details.<br>• Zero Scoring: | | |

| Deliverables / Performance Indicators | Weight Allocated | Reference pages in the bidder's proposal. |
|---|---|---|
| - The bidder fails to submit case studies, the submitted case studies are older than 5 years, or the content is completely irrelevant to brand experience and global trade activations. | | |
| Total Weight | 100 | |
| *Minimum threshold required for bidders to move to pitch 70%* | | |

*NB:* Bidders are required to score a minimum of 70 out of 100 from the above criteria in order to be considered for pitch presentation.

NB: Bidders who successfully pass phase 2A will be invited to a compulsory pitch briefing session prior to the pitch presentation evaluation.

Pitch presentation

| Pitch Presentation Criteria | Weight Allocated | Comments |
|---|---|---|
| Pitch Presentation Criterion: Strategic Approach to Technology-Enabled Solutions<br>The bidder must present and demonstrate a strategic approach to technology-enabled solutions that maximize brand exposure and operational integrity across all divisions. The presentation and accompanying technical demonstration must cover the following five (5) requirements:<br><br>1. Digital Merchandising Platform: The development, architecture, and live demonstration of a system (e.g., website or dedicated application) for brand merchandising and branding.<br><br>2. System Integration & Real-Time Data: Proven integration capabilities with current systems (such as the TQIT platform and CRM) ensuring real-time data visibility.<br><br>3. Smart Verification & Anti-Fraud: Smart verification mechanisms and anti-fraud solutions designed to protect national tourism brand integrity (e.g., plaque destruction certification, tracking illegal advertising, and secure QR/laser printing verification).<br><br>4. Tracking, Monitoring & Inventory: End-to-end tracking and monitoring capabilities for all collateral, merchandise, and warehouse storage.<br><br>5. Automated Stakeholder Communications: Automated stakeholder and customer communication process flows (e.g., multi-stage SMS notifications and automated WhatsApp Business API updates).<br><br>Points Allocation Matrix<br>• 3 Points: The bidder presents and successfully demonstrates all 5 requirements specified above, providing clear, robust technical details and live workflow proofs for each. | 50 | |

| | | |
|---|---|---|
| • 2 Points: The bidder presents and demonstrates 4 of the requirements specified above, with clear details outlining each.<br>• 1 Point: The bidder presents and demonstrates 3 of the requirements specified above, with clear details outlining the requirements.<br>• 0 Points: The bidder presented less than 3 requirements specified above, fails to demonstrate the technology, or submits/presents something irrelevant. | | |
| Pitch Presentation Criterion: Creative Plaque Production, Design, and Branding<br>During the pitch presentation, the bidder must showcase innovative and creative concepts around the design, production, and physical enhancements of TGCSA plaques, certificates, and brand merchandising. The presentation and sample physical submissions must address the following key areas:<br>1. Innovative Plaque Design & Durability: Creative enhancements to the standard Perspex and metal components (e.g., introducing rust-resistant features like galvanized rods for coastal establishments, high-resolution UV laser printing, and friction-free protective packaging).<br>2. 5-Star Premium & Luxury Collateral Execution: Creative execution and physical presentation of the A4 high-gloss, gold-foiled certificate and its elite black floating frame packaging (including fragile-care boxing and tissue presentation).<br>3. Sustainable Recycling & Circular Economy Concepts: Creative methodologies for certified plaque recycling, repurposing expired Perspex for reprinting, or integrating local youth employment initiatives into the plaque production cycle.<br>4. Corporate Identity (CI) & Visual Appeal: Flawless application of strict CI guidelines, precise Pantone color matching, and high-impact visual presentation across all submitted physical samples and branding elements.<br>Points Allocation Matrix<br>• 3 Points: The bidder presents and demonstrates all 4 requirements specified above, showcasing exceptional creativity, superior material quality, robust durability improvements, and innovative sustainable/recycling solutions with flawless physical samples.<br>• 2 Points: The bidder presents and demonstrates 3 of the requirements specified above, providing clear creative and design details for those areas with satisfactory physical samples.<br>• 1 Point: The bidder presents and demonstrates 2 of the requirements specified above, with basic creative concepts or minor gaps in material quality and CI compliance.<br>• 0 Points: The bidder presents 1 or fewer requirements specified above, fails to bring or present required physical samples, or submits concepts that are irrelevant to TGCSA standards. | 50 | |
| Total Weight | 100 | |
| | | |

*The minimum threshold required for bidders to pass this stage is 70% for the Pitch Presentation.*

Bidders must meet the minimum threshold of 70% on pitch presentation to proceed to Phase 3: Price and Preference (specific goals) evaluation.

- 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:

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

Only Bidders who meet the minimum of 70% threshold of functionality in Phase 2 will be evaluated in Phase 3 for price and preference (Specific goals).

The total points for price evaluation (out of 80) and the total points for specific goals evaluation (out of 20) will be consolidated. The bidder who scores the highest points for comparative pricing and specific goals of after the consolidation of points will normally be considered as the preferred bidder with who South African Tourism will enter into further negotiations for the contract.

Table 5: Price and Preference (specific goals)

**1.** LIST OF RETURNABLES

BIDDERS SHOULD PLEASE ADHERE TO THE FOLLOWING INSTRUCTIONS

a) TICK APPLICABLE BOX

b) ENSURE THAT THE FOLLOWING DOCUMENTS ARE COMPLETED, SUBMITTED AND SIGNED WHERE APPLICABLE

| ANNEXURES | DOCUMENT DECRIPTION | YES | NO |
|---|---|---|---|
| PART A & B | IS BID INVITATION FORM, TERMS, AND CONDITIONS FOR BIDDING COMPLETED, SIGNED, AND SUBMITTED? | | |
| SUPPLIER IS REQUIRED TO USE THE PRESCRIBED SEQUENCE IN ATTACHING THE ANNEXURES THAT COMPLETE THE BID OR RFQ DOCUMENT | | | |

| | | | | |
|---|---|---|---|---|
| ANNEXURE A | IS THE STANDARD BID DOCUMENT (SBD4) FORM BIDDER'S DISCLOSURE COMPLETED, SIGNED AND SUBMITTED? | | |
| ANNEXURE 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? | | |
| ANNEXURE C | 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? | | |
| ANNEXURE D | 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) | | |
| ANNEXURE E | 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. | | |
| ANNEXURE F | 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. | | |
| ANNEXURE G | 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 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, COLOUREDS 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.

4.12 80 / 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 | Specific Goals (Maximum points) |
| iii. | Black Ownership | : | 10 points | |
| iv. | Black Youth | : | 02 points | |
| v. | Small, Medium and Micro Enterprises (SMME's) | : | 04 points | |
| | 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.

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

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: $10 \times \frac{\%\,\mathrm{BO}}{100} =$ ☐

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 AFFIDAVID 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.

TABLE B: OWNERSHIP

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

| | | | | *(BLACK, WHITE, ETC.)* | | |
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| | | | | | | |
| Total | | | | | | |

*(To be completed by bidder)*

*TABLE- C: SPECIFIC GOALS*

| OWNERSHIP | TOTAL PERCENTAGE OF OWNERSHIP | SPECIFIC GOALS POINTS CLAIMED |
|---|---|---|
| | | |
| Black Woman ownership | | |
| Black Ownership | | |
| Black Youth Ownership | | |
| Total | | |

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

c. BIDDERS SHOULD INDICATE THE PLANNED DELIVERY PERIOD (IN DAYS) FROM THE DATE AN ORDER IS ISSUED

**5.** POPIA DISCLAIMER

5.1. COMPLIANCE WITH THE PERSONAL INFORMATION ACT, 4 OF 2013

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.

5.2. CONSENT TO PROCESSING AND FURTHER PROCESSING OF PERSONAL INFORMATION

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.

5.3. FURTHER PROCESSING OF PERSONAL INFORMATION

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.

5.4. DUTY OF CARE

THE SAT VALUES YOUR PRIVACY AND SHALL TAKE ALL REASONABLE MEASURES TO PROTECT RECEIVED PERSONAL INFORMATION.

5.5. EXEMPTION FROM LIABILITY

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

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