REQUEST FOR QUOTATION (RFQ)

REQ_NHFC010370

REQUEST FOR QUOTATION (RFQ) FOR:

EXTERNAL COMMUNICATIONS AND REPUTATION MANAGEMENT SERVICE PROVIDER

RFQ DOCUMENTS CHECK LIST:

The contents of the RFQ document must be numbered as per the numbering below, converted to a pdf file and submitted via email before the closing date. Please complete the checklist below to verify your submission of the relevant documents:

Schedules	Description	Submitted – Indicate YES or NO
Annexure 1	Tax Compliance Status Pin	
Annexure 2	Copies of Company Registration Documents	
Annexure 3	Copy of Valid B-BBEE certificate or Sworn Affidavit.	
Annexure 4	Current Central Supplier Database Report Copy	
Annexure 5	SBD 1: Invitation to Bid	
Annexure 6	Pricing Schedule	
Annexure 7	SBD 4: Bidder's Disclosure	
Annexure 8	SBD 6.1: Preference Point Claim Form in Terms of Preferential Procurement Regulations 2022	
Annexure 9	Identity Document of Directors	
Annexure 10	Signed or Initialised General Conditions of Contract (GCC)	

SECTION 1

SBD 1 INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE NHFC SOC LTD.					
BID NUMBER:	REQ_NHFC010370	CLOSING DATE:	30 October 2026	CLOSING TIME:	11:00AM
DESCRIPTION	**EXTERNAL COMMUNICATIONS AND REPUTATION MANAGEMENT SERVICE PROVIDER**				

BID RESPONSE DOCUMENTS MAY BE EMAILED TO:
Quotations02@nhfc.co.za

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO		TECHNICAL ENQUIRIES MAY BE DIRECTED TO:	
CONTACT PERSON	Ms Kamogelo Dagane	CONTACT PERSON	
TELEPHONE NUMBER		TELEPHONE NUMBER	
FACSIMILE NUMBER	N/A	FACSIMILE NUMBER	
E-MAIL ADDRESS	Quotations02@nhfc.co.za	E-MAIL ADDRESS	

SUPPLIER INFORMATION				
NAME OF BIDDER				
POSTAL ADDRESS				
STREET ADDRESS				
TELEPHONE NUMBER	CODE		NUMBER	
CELLPHONE NUMBER				
FACSIMILE NUMBER	CODE		NUMBER	
E-MAIL ADDRESS				
VAT REGISTRATION NUMBER				
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No: MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	[TICK APPLICABLE BOX] Yes No	B-BBEE STATUS LEVEL SWORN AFFIDAVIT	[TICK APPLICABLE BOX] Yes No	

[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]

ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	Yes No [IF YES ENCLOSE PROOF]	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	Yes No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]

QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS

IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? YES NO

DOES THE ENTITY HAVE A BRANCH IN THE RSA? YES
NO

DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?
☐ YES ☐ NO

DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?
☐ YES ☐ NO

IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? YES NO ☐
IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.

TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:

1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.

1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED– (NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.

1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.

1.4. THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).

2. TAX COMPLIANCE REQUIREMENTS

2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.

2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.

2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.

2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.

2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.

2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.

2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

SIGNATURE OF BIDDER:……

CAPACITY UNDER WHICH THIS BID IS SIGNED: ……
(Proof of authority must be submitted e.g. company resolution) DATE:……...

SECTION 2
NOTICE TO
BIDDERS

1. RESPONSES TO RFQ

Responses to this RFQ [**Quotations]** must not include documents or reference relating to any other quotation or proposal. Any additional conditions must be embodied in an accompanying letter. Proposals must reach NHFC before the closing hour on the date shown on SBD1 above, and must be e- mailed to **quotations02@nhfc.co.za**

2. PREQUALIFICATION / ELIGIBILITY CRITERIA

2.1 Only those Bidders who satisfy the following pre-qualification or eligibility criteria are eligible to submit quotations as per section 3.

3 COMMUNICATION

Bidder/s are warned that a response will be liable for disqualification should any attempt be made either directly or indirectly to canvass any SCM Officer(s) or NHFC employee in respect of this RFQ between the closing date and the date of the award of the business.

4 LEGAL COMPLIANCE

The successful Bidder shall be in full and complete compliance with any and all applicable national and local laws and regulations.

5 CHANGES TO QUOTATIONS

Changes by the Bidder to its submission will not be considered after the closing date and time.

6 PRICING

All prices must be quoted in South African Rand on a fixed price basis, including VAT if applicable.

7 BINDING OFFER

Any Quotation furnished pursuant to this Request shall be deemed to be an offer. Any exceptions to this statement must be clearly and specifically indicated.

8 RFQ Conditions

- This RFQ is subject to the Preferential Procurement Policy Framework Act 2000, the Preferential Procurement Regulations, 2022, the general conditions of contract (GCC) and,

if applicable, any other legislation or special conditions of contract.

- The lowest or any bid will not necessarily be accepted.
- NHFC reserves the right to reject submitted proposal if deemed necessary. Should it be discovered by the NHFC that the bidder did not act in good faith and/or has declared incorrectly/falsely, NHFC reserves the right to disqualify or reject the bid.
- The NHFC reserves the right to disqualify a bid proposal if the bidders' proposal is not compliant with the scope of work/terms of reference.
- The bidder is subjected to due-diligence process which includes screening, vetting, and/or any best practice necessary for the NHFC to comply with legislation and its Policies and Procedures. Due diligence and PEP checks will also be conducted on the successful bidder.
- The NHFC reserves the right to disqualify a bid if the bidder fails to provide reasonable request (s) for documentation/information which the NHFC deems necessary for the purpose of evaluation within reasonable timelines this includes the set deadline per request,
- Bid rigging/collusive behaviour by the bidder will result in disqualification. A bidder is not permitted to submit proposal from more than one registered company with a common director/shareholder.
- The NHFC deems the Bidder has read and accepted the General Conditions of Contract.
- Bidders must submit the bid a soft copy of the RFQ via email. The soft copy serves as the legal bid contract document and the master record between the bidder and the NHFC.
- The NHFC undertakes to pay out within 30 days from issuance of substantiated invoices issued in terms of this appointment (Payment schedule as defined in the service level agreement). No payment will be made on outstanding information not submitted by the service provider. Service provider must maintain an updated tax compliant status for the during of the contract.
- The cost of compiling a Proposal is and remains the prospective service provider's own cost and will not be paid for by NHFC.
- The successful bidder (s) will be required to sign a Service Level Agreement (SLA), in terms of which the service provider's performance will be measured and managed.

- NHFC has zero tolerance for reputational harm. The bidder hereby gives consent to the NHFC to conduct background checks on the bidding entity and any of its directors / partners / trustees / shareholders /members/employees. The NHFC reserves the right to consider the information arising from such background check as part of the tender evaluation process.
- The NHFC reserves the right to reject submitted proposal(s) if it discovers that the bidder (or its directors/members) has any serious adverse reports, whether confirmed by a court or not, such as:
    - Being cited as aiding and abetting state capture,
    - Involvement in fraud and / or corrupt activities;
    - Misrepresenting audit outcomes of an organisation;
    - Listed on the National Treasury restricted database;
    - Being under investigation or facing allegations that may result in criminal charges; or
    - Any report as a result of which the NHFC may suffer reputational harm in any way by doing business with the bidder.

9 NATIONAL TREASURY'S CENTRAL SUPPLIER DATABASE

Bidders are required to self-register on National Treasury's Central Supplier Database (CSD) which has been established to centrally administer supplier information for all organs of state and facilitate the verification of certain key supplier information. NHFC is required to ensure that price quotations are invited and accepted from prospective bidders listed on the CSD. Business may not be awarded to a bidder who has failed to register on the CSD. Only foreign suppliers with no local registered entity need not register on the CSD. The CSD can be accessed at https://secure.csd.gov.za.

10 PROTECTION OF PERSONAL DATA

In responding to this RFQ, NHFC acknowledges that it may obtain and have access to personal data of the Bidders. NHFC agrees that it shall only process the information disclosed by Bidders in their response to this bid for the purpose of evaluating and subsequent award of business and in accordance with any applicable law.

Furthermore, NHFC will not otherwise modify, amend or alter any personal data submitted by Bidders or disclose or permit the disclosure of any personal data to any Third Party without the prior written consent from the Bidders. Similarly, NHFC requires Bidders to process any personal information

disclosed by NHFC in the bidding process in the same manner.

11 EVALUATION METHODOLOGY

NHFC will utilise the evaluation criteria indicated in this document criteria in choosing a Supplier/Service Provider.

12 ADMINISTRATIVE RESPONSIVENESS

The test for administrative responsiveness will include completeness of response and whether all returnable and/or required documents, certificates; warranties and other RFQ requirements and formalities have been complied with. Incomplete Bids may be disqualified.

13 VALIDITY PERIOD

NHFC requires a validity period of 60 Business Days from the closing date.

Bidders are to note that they may be requested to extend the validity period of their response, on the same terms and conditions, if the internal processes are not finalised within the validity period. However, once the adjudication body has approved the process and award of the business to the successful Bidder(s), the validity of the successful Bidder(s)' response will be deemed to remain valid until a final contract has been concluded.

14 RETURNABLE DOCUMENTS

Returnable Documents means all the documents, Sections and Annexures, as listed in the tables below. There are three types of returnable documents as indicated below and Bidders are urged to ensure that these documents are returned with the quotation based on the consequences of non-submission as indicated below:

15 Mandatory Returnable Documents

Failure to provide all these Mandatory Returnable Documents at the Closing Date and time of this RFQ will result in a Bidder's disqualification. Bidders are therefore urged to ensure that all these Documents are returned with their Quotations.

16. UNSUCCESSFUL BIDDERS

Should the bidder not receive any communication from NHFC within the validity of the RFQ. The bidder should consider their bid unsuccessful

SECTION 3

SPECIFICATIONS

EXTERNAL COMMUNICATIONS AND REPUTATION MANAGEMENT SERVICE PROVIDER

1. Introduction

The National Housing Finance Corporation (NHFC) invites proposals from suitably qualified and experienced External Communications Service Providers to develop and implement a comprehensive, integrated multi-media communications and reputation management strategy. The primary goal is to significantly increase the visibility of the NHFC's mandate, funding instruments, and delivery impact within the South African affordable housing sector.

This procurement arises from a deliberate board-level resolution to address a root-cause deficit identified in the NHFC's 10x10 Turnaround Blueprint: the absence of a robust external communications capability commensurate with the Corporation's scale of impact. The service provider appointed under this TOR will play a central role in translating organisational recovery into public confidence, stakeholder trust, and expanded market reach translating into a much-needed increase in market share. The NHFC is seeking a partner — not merely a vendor — a visionary, with sector-wide intelligence, and executional excellence to co-author the NHFC's narrative during a pivotal chapter of its institutional history.

2. Background and Context

2.1 Institutional Overview

The NHFC is a Development Finance Institution (DFI) and state-owned entity (SOE) under the National Department of Human Settlements (DHS). Its core mandate is to broaden and deepen access to affordable housing finance for low-to-middle-income South African households. The Corporation provides wholesale and project development finance to Social Housing Institutions (SHIs), private developers, and retail intermediaries. It also administers national programmes including First Home Finance (formerly FLISP).

With a loan book spanning multiple product lines, a national project footprint, and a direct linkage to South Africa's constitutional right of access to adequate housing, the NHFC occupies a uniquely consequential position in the DFI ecosystem. Its communications therefore carry both developmental

significance and reputational stakes that are proportionately high. Prospective service providers are expected to appreciate and respond to this context with appropriate depth of organisational strategy and the NHFC mandate.

2.2 Performance Context & Turnaround Trajectory

The NHFC Board, appointed in August 2025, undertook a thorough analysis of organisational performance and identified twelve root-cause issues in the 10x10 Turnaround Blueprint. Among these, “Lack of Public Confidence” was identified as a structurally important deficit requiring deliberate intervention.

Key performance data establishing the baseline for this assignment:

- FY 2024/25: NHFC achieved 54% of APP targets, well below the 80% shareholder threshold, causing reputational damage.
- Q2 FY 2025/26: Performance dipped to 65%, down from 74% in Q1.
- Q3 and Q4 FY 2025/26: The entity recovered to 74% in both quarters.
- Full-year FY 2025/26: Overall performance reached 75% — still below the 80% threshold but a significant improvement from the prior year.
- Core business KPI achievement: 11 of 13 targets (85%), confirming operational mandate delivery is on track.

The data above reveals a critical asymmetry: NHFC’s operational performance is recovering meaningfully, yet its public and stakeholder perception remains largely anchored to historical negative narratives. This gap between actual performance and perceived performance constitutes the primary communications challenge the appointed service provider must resolve. The brief is therefore not merely promotional; it is reputationally corrective and stakeholder transformative.

2.3 Current Phase: Stabilisation

The NHFC has transitioned from a “Rescue Phase” to a “Stabilisation Phase.” The Board requires that stakeholders including the Portfolio Committee, shareholder Ministry, financial partners, developers, and the public be kept continuously informed of this trajectory. Short-term wins have not been effectively communicated, and this gap must be urgently addressed.

3. STRATEGIC INITIATIVES REQUIRING COMMUNICATIONS SUPPORT

The NHFC Board and Management are implementing a range of high-priority initiatives that the service provider will be required to support communicatively. These include:

- Shareholder engagement on First Home Finance (FHF) funding in a constrained fiscal environment.
- Introduction of flexible FHF subsidy disbursement mechanisms.
- Scaling lending approvals to R3 billion per annum with disbursements of at least R1 billion.
- Appointment of impact investment professionals to grow the project pipeline.
- Establishment of a dedicated collections function to protect credit independence.
- Equity portfolio reform, including liquidation of non-performing assets.
- Structured MEC-level provincial partnerships to ensure equitable geographic impact.
- Collaboration with sister entities and joint Board Chairs engagement forums.
- Pipeline development in student accommodation and long-term rental products.
- Development of a Revenue Enhancement Strategy to diversify income streams.
- Engaging private-sector companies to incorporate NHFC into their CSI strategies.

Each of the above initiatives carries a distinct stakeholder audience and communications register. The service provider must demonstrate, in their proposal, how their strategy will sequence, differentiate, and integrate messaging across these initiatives — ensuring that no single announcement overshadows another, and that the cumulative narrative builds coherently toward a single, compelling institutional story: the NHFC as a high-performing, trusted, and socially impactful DFI.

4. OBJECTIVES OF THE ASSIGNMENT

- Elevate Brand Visibility: Position the NHFC as South Africa's leading authority and catalyst in affordable housing finance, thereby building public confidence on the entity. This should result in enhanced strategic partnerships.
- Restore and Build Stakeholder Trust: Systematically address negative legacy perceptions held by the Portfolio Committee, financial sector, housing developers, and the public.
- Promote Financial Solutions: Raise market awareness of specific products, including Rental Programme (Private and Social Housing Finance), Incremental Housing Finance, Bridging Finance, Contractor Finance, and First Home Finance.
- Multi-Platform Engagement: Establish a cohesive narrative across digital, social, broadcast, print media and outreach platforms.
- Social Licence to Operate: Strengthen the NHFC's legitimacy and social licence among communities benefiting from its programmes, ensuring communications reach intended beneficiaries and not only institutional partners.
- Internal Communications Alignment: Ensure staff understand and can articulate the turnaround narrative, fostering internal ambassadorship and consistent external messaging.
- Parliamentary and Government Relations Visibility: Develop a targeted communications sub-strategy for the Portfolio Committee on Human Settlements and other oversight bodies, converting scrutiny into informed advocacy.
- Narrative Continuity Plan: Establish a sustained, low-dependency communications rhythm that the NHFC's internal team can maintain independently after the contract period ends.
- Mobilise support from public-sector institutions, municipalities the private sector and other relevant institutions to increase market awareness of the NHFC and its offerings.

5. Scope of Work / Key deliverables: (KEY TASKS – aligned to objectives captured under point 4 above)

5.1 Strategy Formulation

The strategy must guide on the solidifying key partnetships and opportunities. Develop a communication and brand positioning strategy aligned to the NHFC 10X10 strategy.

Develop an integrated media and public relations strategy tailored to targeted B2B and non-business partners (relevant government departments and entities at all spheres of government) as well as the general public for the period up to end March 2027 and from 01 April 2027 to end March 2028.

The strategy must be anchored in a formal Stakeholder Mapping exercise delivered within the first 5 days of appointment. It must segment audiences by influence, interest, and information need, and propose differentiated channel strategies per segment. The strategy must also include a Baseline Reputation Audit drawing on existing media monitoring results, social listening data, and stakeholder perception surveys against which all KPIs will be benchmarked.

5.2 Digital Media Optimisation

Revamp and manage the NHFC's digital touchpoints, including Facebook, X (Twitter), LinkedIn, TikTok and dedicated programme microsites.

The revamp must include a full digital audit delivered within the first 10 days. Website accessibility (WCAG 2.1 compliance) and compatibility with social media platforms, and mobile responsiveness are mandatory. The service provider must propose a social media governance framework including escalation protocols, community management procedures, and a crisis communications playbook specific to digital channels.

5.3 Broadcast and Print Campaigns

Secure regular media placements, television/radio interviews, call-ins; adverts, newsfeeds, squeeze backs and press releases, podcasts detailing key milestones such as public-private partnerships.

Media placements must prioritise outlets with demonstrable reach in the affordable housing sector's target demographic (LSM 4–8). The service provider must maintain a verified media contact database and submit placement reports monthly. All executive media engagements must be preceded by media training refreshers, the cost of which should be included in the proposal.

5.4 Stakeholder Campaigning and public relations

Create specialised campaigns targeting property developers, contractors, accredited housing companies, and low-to-middle-income home buyers.

Campaigns must include a dedicated Parliamentary Stakeholder Communication stream, to ensure that Portfolio Committee members and key oversight officials receive a consistent, evidence-based account of the NHFC's turnaround. The service provider must propose at least one live stakeholder engagement event (in-person or hybrid) per quarter, supported by pre- and post-event communication amplification.

Proactively manage media, stakeholder and staff relations, alongside reputation, as part of public relations management.

5.5 Skills transfer to NHFC staff

Develop and implement a skills transfer programme to NHFC staff in the communications and marketing functions.

The skills transfer programme must be formalised as a structured 6-module curriculum, covering: strategic communications planning; social media management; digital marketing; media relations; media training, media liaison training, crisis communications; stakeholder engagement; and content production. Each module must include a practical assessment. A Competency Baseline Assessment must be conducted in month 1, and a Competency Progress Report submitted in month 5. The service provider must ensure that the NHFC team is demonstrably more self-sufficient at contract conclusion than at commencement. The submission of a detailed close-out report is mandatory.

5.6 Reputation Risk Early Warning System

The service provider must establish and operate a media monitoring and social listening function across all NHFC's media exposure and owned channels, with weekly reporting to the CRO's office and monthly reporting to the Impact, Social, Ethics Committee (ISEC). This function must flag emerging reputational risks, track sentiment trends, and enable pre-emptive communications responses. A standardised Monthly Reputation Dashboard covering earned media, digital sentiment, share of voice, and stakeholder feedback must be delivered by the 5th working day of each month.

6. EXPECTED DELIVERABLES & TIMELINES

The assignment is expected to span a period of eight (8) months from the contract signing date. The following deliverable schedule applies:

Deliverable	Description	Timeline
Inception Report & Strategy	Comprehensive multi-media visibility strategy, stakeholder mapping, baseline reputation audit, and implementation plan.	Within 10 days of appointment
Digital Media Optimisation *Digital Audit Report*	*Full audit of NHFC digital platforms (website, social media, microsites) including accessibility assessment and optimisation roadmap.*	*Within 10 days of appointment*
Strategy Formulation	*As set out in section 5 above*	*Within 1 month of appointment*
Content Repository	A library of media kits, press templates, promotional videos, case studies, and 30th Anniversary Sub-Plan.	Within 30 days of appointment

Broadcast & Print Campaigns	Revamp and manage the NHFC's digital touchpoints, including Facebook, X (Twitter), LinkedIn, TikTok and dedicated programme microsites	Final plan within one month of appointment. Ongoing. Full duration of the project
Stakeholder Campaigning and public relations	Create specialised campaigns targeting property developers, contractors, accredited housing companies, and low-to-middle-income home buyers and dedicated Parliamentary Stakeholder Communication stream,	Final plan within one month of appointment. Ongoing. Full duration of the project
Monthly Reputation Dashboard	*Standardised dashboard covering earned media, digital sentiment, share of voice, and flagged reputational risks. Delivered monthly.*	*5th working day of each month*
Reputation Risk Early Warning System	The service provider must establish and operate a media monitoring and social listening function across all NHFC's media exposure and owned channels, with weekly reporting to the CRO's office and monthly reporting to the Impact, Social, Ethics Committee (ISEC)	Final plan within one month of appointment. Ongoing. Full duration of the project
Skills Transfer Competency Baseline	*Baseline assessment of NHFC internal team competencies across all 6 skills transfer modules.*	*End of Month 1*
Mid-Term Impact Report	Analysis of media reach, digital engagement metrics, brand sentiment, and revised strategy adjustments for months 4–8.	End of Month 4 and 8
Skills Transfer Progress Report	*Competency progress report against month 1 baseline, with module-by-module assessment results.*	*End of Month 5 and 8*
Final Close-Out Evaluation	Comprehensive final report detailing overall visibility growth against baseline, KPI achievement, lessons learned, and a sustainability plan for the NHFC internal team.	End of Month 8

Communications Sustainability Plan

The final deliverable must include a Communications Sustainability Plan: a documented framework, content schedule, and operating guide that enables the NHFC's internal team to maintain momentum independently for at least 12 months post-contract. This is a condition of final payment.

7. REQUIRED QUALIFICATIONS & EXPERIENCE

7.1 Core Requirements

- **Track Recor**d: Proven history of executing high-impact public relations or brand-building campaigns for SOEs or corporate entities.
- **Lead Team Qualifications:** The service provider must submit lead team qualifications and CVs demonstrating combined competency across: strategy, content production, digital/social media, and stakeholder/media relations.
- **Expertise:** Minimum of 10 - 15 years' experience as a senior lead communications strategist, preferably within the South African financial, property, or public sector.
- **Technical Skills:** Advanced proficiency in emerging digital tools, graphic design, multimedia production, media strategies and analytics; and digital analytics.
- **Sector Knowledge:** Deep understanding of the South African human settlements landscape, housing finance, and public sector reporting mechanisms.
- **Crisis Communications Experience:** The service provider must demonstrate at least two prior engagements in which they managed a client's reputational recovery from a publicly documented crisis. Submit case studies.
- **Government Stakeholder Communications**: The proposal must include at least two examples of communications work directed at parliamentary or government oversight audiences, demonstrating the ability to translate technical performance data into accessible public narratives.
- **B-BBEE Compliance:** Service providers are encouraged to demonstrate meaningful B-BBEE compliance, with preference for entities that are at least Level 2 compliant. Sub-contracting arrangements must be clearly disclosed and must not dilute B-BBEE credentials.
- **Professional Indemnity Insurance:** The service provider must hold current professional indemnity insurance of not less than R2 million per claim and submit proof thereof with the proposal.

8. GOVERNANCE & COMPLIANCE

- **Reporting**: The service provider will report directly to the NHFC Chief Executive Officer on operational matters.
- **Board Oversight:** The Impact, Social and Ethics Committee (ISEC) of the NHFC Board will receive quarterly progress reports and has oversight responsibility for reputation management outcomes.
- **Confidentiality**: All data, campaign products, and strategic materials generated during this project remain the sole property of the NHFC.
- **SCM Compliance:** Evaluation will strictly adhere to the NHFC Supply Chain Management Policy, utilising the standard 80/20 preference point system for Price and B-BBEE compliance.
- **Ethical Standards:** The service provider and all subcontractors must adhere to the PRISA (Public Relations Institute of Southern Africa) Code of Ethics and, where applicable, the SABRE (South African Business and Reputation Ethics) framework. Any breach must be disclosed to the NHFC ISEC immediately.
- **Conflict of Interest Declaration**: The service provider must submit a signed Conflict of Interest Declaration at appointment and immediately upon any material change in circumstances during the contract period.
- **No Media Ownership Conflicts:** The service provider must disclose any ownership or financial interests in media entities in which NHFC placements will be sought, to enable the NHFC to assess independence and objectivity.
- **Data Protection**: All personal data processed in the course of this contract must comply with the Protection of Personal Information Act (POPIA). The service provider must submit a POPIA Compliance Statement.
- **Performance Review Meetings:** Formal performance review meetings between the service provider, the CEO, and a representative of ISEC will be held at the end of months 1, 3, and 5. Sub-threshold performance at any review triggers a formal remediation plan within 5 working days.

9. KEY PERFORMANCE INDICATORS (KPIs)

These performance indicators will be monitored on a monthly and quarterly basis throughout the 8-month contract period.

9.1. Earned Media & PR (Broadcast & Print)

- Advertising Value Equivalency (AVE): Minimum of R2,000,000 in positive earned media coverage per quarter.
- Press Releases: Minimum of 1 national press release distributed and picked up by major financial/news publications every month.
- Media Placements: Secure at least 2 high-profile broadcast interviews (TV or radio) per quarter for NHFC executives.

9.2. Digital and Social Media Channels

- Audience Growth: 40% year-on-year increase in followers across LinkedIn, Facebook, TikTok, and X (Twitter).
- Engagement Rates: Average monthly engagement rate of at least 5% on educational content.
- Traffic Referral: 25% increase in traffic to the NHFC web portal through targeted digital campaigns.

9.3. Content management

- **Sentiment Tracking:** Track overall media sentiment (positive/neutral/negative ratio) monthly, with a target of achieving a predominantly positive (60%+) sentiment ratio by month 4.
- **Parliamentary Mentions**: Track favourable references to the NHFC in parliamentary proceedings (Portfolio Committee Hansard), with a target of at least 2 positive references per quarter.
- **Stakeholder Net Promoter Score (NPS)**: Administer a short digital stakeholder perception survey reports at month 1 (baseline) and month 7 (close-out), t
- **Skills Transfer Completion Rate:** Minimum 80% of targeted NHFC staff must complete all 6 skills transfer modules by month 8.
- **Brand Consistency Audit:** Aaudit of NHFC communications materials for brand compliance to be conducted at month 2 and month 7, with a target compliance score of 90%+.

RETURNABLE DOCUMENTS

SECTION 4

EVALUATION CRITERIA

Evaluation of bids received will be conducted in three (03) phases as follows:

Phase 1 – Administrative Compliance Requirements

This stage checks and validates the bidders' compliance to the legal requirements to conduct business in South Africa, as well as to the industry requirement for the supply of goods and services. All SBDs must be submitted (signed) noting where it is not applicable. If any specific SBD is not submitted, documentary proof, clearly stating the reason must be attached.

No.	Description of requirement	
a)	Company Registration Documents	
b)	Copies of Directors' ID documents;	
c)	Valid BBBEE Certificate from a SANAS accredited rating agency (Original or Certified) or affidavit signed by the Commissioner of Oath	
d)	Valid Tax Clearance Certificate (must be valid on closing date of submission of the proposal) and SARS Issued Pin	
e)	CSD report / CSD reference number	
f)	Pricing Schedule	Mandatory
g)	SBD1: Invitation to bid	
h)	SBD 4: Bidders disclosure	
i)	SBD 6: Preference Point Claim Form in Terms of Preferential Procurement Regulations 2022	
j)	Initialised General Conditions of Contract (GCC)	

NB: if the bidder failed to comply with any of the Administrative Compliance Requirements, or if the NHFC is unable to verify whether the Administrative Compliance Requirements are met, then the NHFC reserves the right to:

- Accept the bid for evaluation on condition that the bidder submits within 7 working days any supplementary information to achieve full compliance with Administrative Compliance Requirements.
- All forms, annexures and addendums shall be signed and completed and returned with the Bid Document as a whole. The lowest or any Bid will not necessarily be accepted.

Phase 2 – FUNCTIONALITY EVALUATION CRITERIA

- Supporting material must be provided for the elements below.
- Only bidders scoring a minimum of **70 points out of 100 points** on functional evaluation criteria will be considered for price and specific goals evaluation.

<table>
<tr><td>BIDDER'S PAST RELEVANT EXPERIENCE AND TRACK RECORD</td><td>Total points - 35</td></tr>
<tr><td>The Service Provider must submit three (3) reference letters issued by clients in the name of the bidding company, confirming the successful delivery of projects relating to external communications and reputation management services within the SOE, financial or property sectors.

Reference letters which must include the following information:
- not older than 8 years' experience (2018 onwards),
- with a company logo/ company letterhead
- with contact details of the referee and signed by the referee
- description of service/product
- The letter must be signed by the referee
Reference letters with any of the above required information omitted will not be considered. Please note that the NHFC reserves the right to contact the references as part of the due diligence process for RFQs.

<table><tr><td>3 Letters as per the above</td><td>35 points</td></tr><tr><td>2 Letters as per the above</td><td>20 points</td></tr><tr><td>1 Letter as per the above</td><td>10 points</td></tr><tr><td>No Letter</td><td>0 point</td></tr></table></td><td></td></tr>
<tr><td>QUALIFICATIONS AND EXPERIENCE OF THE TEAM</td><td>Total points - 35</td></tr>
<tr><td>Submit detailed CV's of proposed Lead Communications Specialist demonstrating experience in external communications, brand, strategy and reputation management services. The CV's must clearly indicate how and where years of experience was obtained. (Must attach copies of qualifications and CV's). Foreign qualifications must be accompanied by a valid SAQA verification letter/certificate where applicable. Failure to submit the required SAQA documentation will result in the foreign qualification not being considered for evaluation.

Qualification(s) for Lead Strategist: A minimum qualification at NQF Level 9 in Media, Communications, Journalism, Public Relations or a related field.

<u>Experience of the Lead Strategist</u>: The relevant experience of proposed Lead Communications Specialist whose qualifications have been submitted and verified as meeting the minimum qualification requirement will be considered for evaluation. CV must demonstrate experience as a business or communications strategist, preferably within the South African financial, property, or public sector
<table><tr><td>More than Fifteen (15) years relevant experience with relevant qualification</td><td>25 points</td></tr><tr><td>Thirteen (13) to Fourteen (14) years relevant experience with relevant qualification</td><td>20 points</td></tr><tr><td>Ten (10) to Thirteen (13) years relevant experience with relevant qualification</td><td>10 points</td></tr><tr><td>Ten (10) years relevant experience with relevant qualification</td><td>5 points</td></tr><tr><td>Less than ten (10) years relevant experience</td><td>0 point</td></tr></table></td><td></td></tr>
</table>

Qualification(s) for **Multimedia/Digital Creator**: A minimum qualification at NQF Level 7 in Graphic Design, Media, Digital Marketing, or a related field.

<u>Experience of the Multimedia/Digital Creator</u>: The relevant experience of proposed Multimedia/Digital Creator whose qualifications have been submitted and verified as meeting the minimum qualification requirement will be considered for evaluation. CV must demonstrate experience in emerging digital tools, graphic design, multimedia production, media strategies and analytics; and digital analytics.

More than Five (5) years relevant experience with relevant qualification	10 points
Three (3) to Four (4) years relevant experience with relevant qualification	5 points
Less than three (3) years relevant experience	0 point

METHODOLOGY & STRATEGIC APPROACH **Total points - 30**

Criteria	Weight	Comprehensive	Good	Basic	Poor / Non-Compliant
Approach Paper: Alignment with NHFC mandate and target demographics	**10 Points**	Demonstrates a thorough understanding of the NHFC mandate, 10X10 Turnaround Blueprint, stabilisation phase and reputation challenges. Clearly identifies and segments key audiences, including government, parliamentary stakeholders, financial partners, developers and beneficiaries. Provides a coherent, evidence-based strategy aligned with the assignment objectives.	Demonstrates a good understanding of the NHFC mandate and most key audiences. Provides a relevant strategy, but some elements of audience segmentation, reputational challenges or strategic alignment lack detail.	Demonstrates limited understanding of the NHFC mandate and target audiences. The approach is largely generic, with limited alignment to the stated objectives.	No methodology or approach paper submitted, or the submission does not address the criterion.
		8-10 Points	**5-7 Points**	**1-4 Points**	**0 Points**
Media Channels & Tools: Integration of broadcast, print, and digital	**10 Points**	Presents a comprehensive, integrated multi-channel strategy covering broadcast, print, digital and social media, stakeholder outreach and media relations. Identifies appropriate channels for target audiences and explains	Covers most required channels and provides a generally appropriate integration strategy. Some detail on audience-specific channel selection, monitoring or	Addresses only some communication channels, with limited integration, audience targeting or explanation of	No media channel strategy submitted, or the submission does not address the

		content integration, media monitoring, performance measurement and reputation risk management.	performance measurement is lacking.	how effectiveness will be measured.	criterion.
		8-10 Points	**5-7 Points**	**1-4 Points**	**0 Points**
Work Plan & Timelines: Detailed project plan with risk management	**10 Points**	Provides a detailed, practical implementation plan aligned with the eight-month contract period and TOR deliverables. Includes milestones, timelines, responsibilities, stakeholder engagement, reporting arrangements, measurable outputs, dependencies and a risk management plan covering reputational, operational and digital risks.	Provides a workable project plan covering most key deliverables and timelines. Includes some risk management and reporting arrangements, but certain activities, responsibilities or milestones lack detail.	Provides a basic or incomplete work plan with limited detail on timelines, responsibilities, deliverables or risk management.	No project plan or work plan submitted, or the submission does not address the criterion.
		8-10 Points	**5-7 Points**	**1-4 Points**	**0 Points**
TOTAL					**Total points 100**

Phase 3 - Price and Preference Evaluation

Bidders will be evaluated in terms of Price and Preference points (As per the Preferential Procurement Policy Regulations of 2022: Specific goals). **See Table below:**

	Price		**80 points**
	Specific Goals		**20 points**
#	**Specific Goal**	**Proof**	**Points Allocation**
1	South African citizen who had no franchise in national elections prior to the introduction of the Constitution of the Republic of South Africa, 1983 (Act 200 of 1983) or the Constitution of the Republic of South Africa, 1996. (Minimum >50% ownership or more)	• Company Registration Certification (CIPC) • Certified identification documentation of company director/s • CSD report/ CSD registration number (MAAA number)	**6**
2	Woman Ownership >50%	• Company Registration Certification (CIPC) • Certified identification documentation of company director/s • CSD report/ CSD registration number (MAAA number)	**8**
3	Disabled Ownership >50%	• Company Registration Certification (CIPC) • Certified identification documentation of company director/s • CSD report/ CSD registration number (MAAA number) • Certified medical certificate from a registered medical practitioner	**1**
4	Youth Ownership >50%	• Company Registration Certification (CIPC) • Certified identification documentation of company director/s • CSD report/ CSD registration number (MAAA number)	**5**

PRICING SCHEDULE

Service providers must submit a fixed-cost proposal matching the format below. All prices must be inclusive of Value Added Tax (VAT) where applicable.

Recommended that at least 40% of the total contract value be structured as deliverable-linked milestone payments (not time-based retainer payments) to incentivise quality output and on-time delivery.

Milestone	Triggering Deliverable	Suggested % of Contract Value
Month 1 — Mobilisation	*Inception Report, Stakeholder Map, Digital Audit, Baseline Reputation Audit*	*20%*
Month 2–3 — Execution Tranche 1	*Content Repository, Monthly Reports (x2), Mid-Term Impact Report*	*30%*
Month 4–8 — Execution Tranche 2	*Monthly Reports (x2), Stakeholder Event, Skills Transfer Progress Report*	*30%*
Month8 — Close-Out	*Final Evaluation Report, Communications Sustainability Plan, consolidated social media report NPS Survey*	*20%*

NO	Description	Price (excl VAT)
1	Month 1 — Mobilisation Inception Report, Stakeholder Map, Digital Audit, Baseline Reputation Audit	
2	Month 2–3 — Execution Tranche 1 Content Repository, Monthly Reports (x2), Mid-Term Impact Report	
3	Month 4–8 — Execution Tranche 2 Monthly Reports (x2), Stakeholder Event, Skills Transfer Progress Report	
4	Month 8 — Close-Out Final Evaluation Report, Communications Sustainability Plan, consolidated social media report NPS Survey	
5	Monthly retainer fee	
SUBTOTAL		
VAT @ 15%		
GRAND TOTAL		

RETURNABLE DOCUMENT

SECTION 5

NHFC GENERAL CONDITIONS OF PURCHASE

General

NHFC and the Supplier enter into an order/contract on these conditions to supply the items (goods/services/works) as described in the order/contract.

Conditions

These conditions form the basis of the contract between NHFC and the Supplier. Notwithstanding anything to the contrary in any document issued or sent by the Supplier, these conditions apply except as expressly agreed in writing by NHFC.

No servant or agent of NHFC has authority to vary these conditions orally. These general conditions of purchase are subject to such further special conditions as may be prescribed in writing by NHFC in the order/contract.

Local Content Obligations

Bidders are to note that the Local Content commitments made by the successful Bidder(s) will be incorporated as a term of the contract and monitored for compliance. Should the successful Bidder fail to meet its Local obligations, non-compliance penalties shall be applicable. Breach of Local Content obligations also provide NHFC cause to terminate the contract in certain cases where material non-compliance with Local Content requirements are not achieved.

Price and payment

The price or rates for the items stated in the order/contract may include an amount for price adjustment, which is calculated in accordance with the formula stated in the order/contract.

The Supplier may be paid in one currency other than South African Rand. Only one exchange rate is used to convert from this currency to South African Rand. Payment to the Supplier in this currency other than South African Rand, does not exceed the amounts stated in the order/contract. NHFC pays for the item within 30 days of receipt of the Suppliers correct tax invoice.

Delivery and documents

The Supplier's obligation is to deliver the items on or before the date stated in the order/contract. Late deliveries or late completion of the items may be subject to a penalty if this is imposed in the order/contract. No payment is made if the Supplier does not provide the item as stated in order/contract.

Where items are to be delivered the Supplier:

Clearly marks the outside of each consignment or package with the Supplier's name and full details of the destination in accordance with the order and includes a packing note stating the contents thereof; On dispatch of each consignment, sends to NHFC at the address for delivery of the items, an advice note specifying the means of transport, weight, number of volume as appropriate and the point and date of dispatch; Sends to NHFC a detailed priced invoice as soon as is reasonably practical after dispatch of the items, and states on all communications in respect of the order the order number and code number (if any).

Containers / packing material

Unless otherwise stated in the order/contract, no payment is made for containers or packing materials or return to the Supplier.

Title and risk

Without prejudice to rights of rejection under these conditions, title to and risk in the items passes to NHFC when accepted by NHFC.

Rejection

If the Supplier fails to comply with his obligations under the order/contract, NHFC may reject any part of the items by giving written notice to the Supplier specifying the reason for rejection and whether and within what period replacement of items or re-work are required.

In the case of items delivered, NHFC may return the rejected items to the Supplier at the Supplier's risk and expense. Any money paid to the Supplier in respect of the items not replaced within the time required, together with the costs of returning rejected items to the Supplier and obtaining replacement items from a third party, are paid by the Supplier to NHFC.

In the case of service, the Supplier corrects non-conformances as indicated by NHFC.

Warranty

Without prejudice to any other rights of NHFC under these conditions, the Supplier warrants that the items are in accordance with NHFC's requirements, and fit for the purpose for which they are intended, and will remain free from defects for a period of one year (unless another period is stated in the Order) from acceptance of the items by NHFC.

Indemnity

The Supplier indemnifies NHFC against all actions, suits, claims, demands, costs, charges and expenses arising in connection therewith arising from the negligence, infringement of intellectual or legal rights or

breach of statutory duty of the Supplier, his subcontractors, agents or servants, or from the Supplier's defective design, materials or workmanship.

The Supplier indemnifies NHFC against claims, proceedings, compensation and costs payable arising out of infringement by the Supplier of the rights of others, except an infringement which arose out of the use by the Supplier of things provided by NHFC.

Assignment and sub-contracting

The Supplier may not assign or subcontract any part of this order/contract without the written consent of NHFC.

Termination

NHFC may terminate the order/contract at any time (without prejudice to any right of action or remedy which has accrued or thereafter accrues to NHFC):

If the Supplier defaults in due performance of the order/contract, or if the Supplier becomes bankrupt or otherwise is, in the opinion of NHFC, in such financial circumstances as to prejudice the proper performance of the order/contract, or for any other reason in which case the Supplier will be compensated for all costs incurred.

Governing law

The order/contract is governed by the law of the Republic of South Africa and the parties hereby submit to the non- exclusive jurisdiction of the South African courts.

SECTION 6

SBD 4

RETURNABLE DOCUMENT

BIDDER'S DISCLOSURE

PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

Bidder's declaration

Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest1 in the enterprise, employed by the state? **YES/NO**

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

Full Name	**Identity Number**	**Name of State institution**

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

If so, furnish particulars:

……

……

Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract?

YES/NO

If so, furnish particulars:

……

……

1. DECLARATION

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

3.1 I have read and I understand the contents of this disclosure;

3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;

3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium2 will not be construed as collusive bidding.

3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.

3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

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

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT. I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

…… ……..

Signature Date

…… ……

Position Name of bidder

RETURNABLE DOCUMENT

SECTION 7

SBD 6.1

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

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

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

1. GENERAL CONDITIONS

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

1.2 the 80/20 system for requirements with a Rand value up to R50 000 000 (all applicable taxes included); and

1.3 To be completed by the organ of state

(*delete whichever is not applicable for this tender*).

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

1.4 The 80/20 preference point system will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

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

(a) Price; and

(b) Specific Goals.

1.6 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

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

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

1.8 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

2.1 **"tender"** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;

2.2 **"price"** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;

2.3 **"rand value"** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

2.4 **"tender for income-generating contracts"** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and

(a) **"the Act"** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 PREFERENCE POINT SYSTEMS

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

80/20

$$Ps = 80\left(1 - \frac{Pt - P\,min}{P\,min}\right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

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

3.2.1. POINTS AWARDED FOR PRICE

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

80/10

$$Ps = 80\left(1 + \frac{Pt - P\,max}{P\,max}\right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmax = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

4.1 In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:

4.2 In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—

a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or

b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,

then the organ of state must indicate the points allocated for specific goals for both the 80/20 or 90/10 preference point system.

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

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

The specific goals allocated points in terms of this tender	Supporting evidence for meeting preferential procurement targets (bidder to provider the below supporting evidence to claim allocated points for each specific goal)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
South African citizen who had no franchise in national elections prior to the introduction of the Constitution of the Republic of South Africa, 1983 (Act 200 of 1983) or the Constitution of the Republic of South Africa, 1996. (Minimum >50% ownership or more)	• Company Registration Certification (CIPC) • Certified identification documentation of company director/s • CSD report/ CSD registration number (MAAA number)	**6**	
Woman Ownership >50%	• Company Registration Certification (CIPC) • Certified identification documentation of company director/s • CSD report/ CSD registration number (MAAA number)	**8**	

Disabled Ownership >50%	• Company Registration Certification (CIPC) • Certified identification documentation of company director/s • CSD report/ CSD registration number (MAAA number) • Certified medical certificate from a registered medical practitioner	**1**	
Youth Ownership >50%	• Company Registration Certification (CIPC) • Certified identification documentation of company director/s • CSD report/ CSD registration number (MAAA number)	**5**	

DECLARATION WITH REGARD TO COMPANY/FIRM

4.1. Name of company/firm…….

4.2. Company registration number: ……...

4.3. TYPE OF COMPANY/ FIRM

□ Partnership/Joint Venture / Consortium
□ One-person business/sole propriety
□ Close corporation
□ Public Company
□ Personal Liability Company
□ (Pty) Limited
□ Non-Profit Company
□ State Owned Company
[TICK APPLICABLE BOX]

4.4. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

i) The information furnished is true and correct;

4.5. The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;

4.6. In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;

4.7. If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –

(a) disqualify the person from the tendering process;

(b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;

(c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;

(d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and

(e) forward the matter for criminal prosecution, if deemed necessary.

.....

SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME: .....

DATE: .....

ADDRESS: .....

.....

.....