



**PRE-PROPOSAL INFORMATION RETURN – AMENDED CODES**

Date: .....

**ADMINISTRATIVE DETAILS**

Full Company Name: .....  
 (Please insert the registered company name, and trading name if applicable)

Physical Address: .....  
 .....

Company Registration Number: .....

Company VAT Number: .....

Name of Responsible Person: .....  
 Please be aware that this person will be privy to confidential information about the company and its employees.

Contact Telephone Number: .....

Alternate Telephone Number / cell:.....

Email: .....  
 Please be aware that this e mail address will receive information which is confidential eg; queries on salaries, company net profit after tax etc....

**COMPANY DETAILS**

Financial information	Audited, signed financials (no more than 18 months old) Note – for construction sector – financials may be no more than 12 months old.	
	Management Accounts (financial period no older than 18 months old) Note – for construction sector – financial period may be no more than 12 months old	
	Financial year end to be applied eg February 2024	
Confirm, by initialing in block alongside, that you have not been rated on this financial period by another verification agency.		

**Very important** – the onsite verification will not take place unless audited, signed financials are available. If not, verification of management accounts will be required and will need to be done prior to the onsite. An additional fee will be charged for the steps taken to verify these accounts.

Please indicate Annual Total Revenue for the most recent financial year – “the measured period”;

<u>Annual Total Revenue:</u>				<u>Industry Sector:</u>
<input type="checkbox"/> <= R2.5 million				<input type="checkbox"/> Transport – if so – please contact our office for “old codes” pre-proposal
<input type="checkbox"/> > R1.8 million < R6 million construction BEP only				<input type="checkbox"/> Tourism
<input type="checkbox"/> > R5 million <= R10 million tourism only				<input type="checkbox"/> Forestry
<input type="checkbox"/> > R3 million <R10 million construction contractor only				<input type="checkbox"/> Information & Communication Technology
<input type="checkbox"/> > R6 million < R25 million construction BEP only				<input type="checkbox"/> Property
<input type="checkbox"/> > R10 million < R25 million				<input type="checkbox"/> Agriculture
<input type="checkbox"/> >= R25 million construction BEP only				<input type="checkbox"/> MAC (Marketing, Advertising, Communication)
<input type="checkbox"/> >= R25 million < R50 million / R45 million tourism only				<input type="checkbox"/> Construction - Contractors
<input type="checkbox"/> >= R50 million / (R45 million tourism only) < R100 million				<input type="checkbox"/> Construction - BEP
<input type="checkbox"/> >= R100 million < R250 million				<input type="checkbox"/> Financial Services
<input type="checkbox"/> >= R250 million < R500 million				<input type="checkbox"/> Defense / Chartered Accountancy
<input type="checkbox"/> >= 500 million < R1 billion				<input type="checkbox"/> None of the above
<input type="checkbox"/> R1 billion and above				
<input type="text" value="Current total staff compliment"/>				

Describe your organization’s core business.	
If part of a larger organization / group, please describe.	
Number of locations at which the business operates.	

**TYPE OF RATING**

The request is for;

Re-Evaluation*		Detail reason for request:
Full Verification		

\* For re-evaluation – only complete sections which are to be re-evaluated.

**ELEMENTS TO BE MEASURED;**

**OWNERSHIP**

Is there Black ownership in the business?		
Black": RSA citizens who are African, Indian/Asian, Coloured, Chinese persons by birth or descent.		
No		
Yes	% Black ownership	
	Shares are held by;	An individual
		Another company
		A Trust
		ESOP (Employee Share Ownership Programme)
		Broad Based Ownership Scheme
Are the shares fully owned by the Black owner/s? ie there is no debt / loan owed on the shares?		

**MANAGEMENT CONTROL**

Are there Black employees, who hold rights of ownership, and/or serve on the Board, and/or have overall responsibility for managing and directing, and are involved in implementing the business' strategy?	No	Yes
Number of <u>Black</u> managers / foremen/ supervisors/ professionals/ technicians?		

**SKILLS DEVELOPMENT**

Were there black employees and black people trained in the financial period?	No	Yes
Were any black people (not employees) trained in the financial period?	No	Yes
Number of black learners / apprentices / interns employed in financial period		

**PREFERENTIAL PROCURMENT**

Did you procure any goods and services from suppliers who have BBBEE certificates / affidavits?	No	Yes
Was there any spend on imported goods in the financial period?	No	Yes

**ENTERPRISE DEVELOPMENT**

Has any assistance (eg, cash, grants, loans, preferred payment terms) or in kind (eg, professional assistance), been provided in the last financial period to black owned businesses?	No	Yes
Number of beneficiaries		

**SUPPLIER DEVELOPMENT**

Has any assistance (eg, cash, grants, loans, preferred payment terms) or in kind (eg, professional assistance), been provided in the last financial period to 50% or more small black owned suppliers?	No	Yes
Number of beneficiaries		

**SOCIO-ECONOMIC DEVELOPMENT**

Has any assistance, eg, donations made that benefit Black people, eg, education, community, sports, cultural organisations been made which will be claimed?	No	Yes
Number of beneficiaries		

**YOUTH EMPLOYMENT SERVICE (Y.E.S) INITIATIVE**

Will recognition for Y.E.S be claimed?	No	Yes
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**ADDITIONAL CONSIDERATIONS**

Has there been any consultancy previously provided relating to B-BBEE? "Consultancy means the provision of any service that assists a measured entity to implement a B-BBEE Strategy or any element of a B-BBEE Strategy" (R47-03)	No	Yes
<i>If yes, please provide name of consultant / company;</i>		
When does your current certificate expire?	Date:	
Is there an urgency to the issuing of your new certificate ie; is there a specific date you require it to be issued by?	No	Yes, by (date)

Kindly return by e mail to: [prem@beerated.org](mailto:prem@beerated.org) and [sinazo@beerated.org](mailto:sinazo@beerated.org)

**ACCEPTANCE**

(For internal use only)

CHECKED BY:	Verification Manager	Date		
ENSURE "ADDITIONAL CONSIDERATIONS" HAVE BEEN TAKEN INTO ACCOUNT: (if applicable provide comment in relevant sub section)			NO	YES
ACCEPTED (if no, ensure reasons are documented on risk assessment)				
Quoted Price & Deliberations				