



PRE-PROPOSAL INFORMATION RETURN - AMENDED CODES OF GOOD PRACTICE

Date:

Section 1: Administration 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....

Section 2. Company Description

We will be measured using; ✓

Audited, signed financials (no more than 12 months old)	✓
Management Accounts (for most recent financial year end)	

You may elect to be measured using management accounts for latest financial period should your audited financials not be ready. When using management accounts - additional information will be required and, as such, an additional fee will be charged for the steps taken to verify these accounts.

Most recent financial year-end which will be applied eg; February 2020 _____

Confirm, by initialing, that you have not been rated on this financial period by another agency

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

<u>Annual Total Revenue:</u>		<u>Industry Sector:</u>	
<= R2.5 million	√	Transport – Road Freight	√
>R1.8 million < R6 million construction BEP only		Transport – Forwarding & Clearing	
>R5 million <= R10 million tourism only		Transport – Maritime Transport & Services	
>R3 million <R10 million construction contractor only		Tourism	
>R6 million < R25 million construction BEP only		Forestry	
>R10 million < R25 million		Information & Communication Technology	
>= R25 million construction BEP only		Property	
>= R25 million < R50 million / R45 million tourism only		Agriculture	
>= R50 million / R45 million tourism only < R100 million		MAC (Marketing, Advertising, Communication)	
>= R100 million < R250 million		Construction - Contractors	
>= R250 million < R500 million		Construction - BEP	
>= 500 million < R1 billion		Financial Services	
R1 billion and above		Defense / Chartered Accountancy	
		None of the above	
Total staff compliment			

Section 3. Nature of Business

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

Section 4. Type of Rating

The request is for;

√ Yes

4.1 Re-Evaluation*		Detail reason for request:
4.2 Full Verification		

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

Section 5. Ownership

	√Yes	√No
5.1 Is there <u>Black</u> * ownership in the business?		
5.2 If yes, indicate % Black ownership		
5.3 Are Black shares held by;		
5.4 An individual?		
5.5 Another company		
5.6 A Trust		
5.7 ESOP (Employee Share Ownership Programme)		
5.8 Broad Based Ownership Scheme		
5.9 If so, are the shares fully owned by the Black owner/s? ie – there is no debt / loan owed on the shares		

NB: * "Black": RSA citizens who are African, Indian/Asian, Coloured, Chinese persons by birth or descent.

Section 6. Management Control

	√Yes	√No
6.1 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?		
6.2 Number of <u>Black</u> managers / foremen/ supervisors/ professionals/ technicians?		

Section 7. Skills Development

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

Section 8. Preferential Procurement

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

Section 9. Enterprise Development

	√Yes	√No
9.1 Has any assistance (eg, cash, grants, loans, preferred payment terms) or in kind (eg, professional assistance), been provided in the last financial period to small, micro <u>Black</u> businesses?		
9.2 Number of beneficiaries		

Section 10. Supplier Development

	√Yes	√No
10.1 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?		
10.2 Number of beneficiaries		

Section 11. Socio-economic Development

	√Yes	√No
11.1 Has any assistance, eg, donations made that benefit Black people, eg, education, community, sports, cultural organisations?		
11.2 Number of beneficiaries		

Section 12. Youth Employment Service (Y.E.S) Initiative

	√Yes	√No
12.1 Will recognition for Y.E.S be claimed?		

Section 13. Other

	√Yes	√No
13.1 Has there been any consultancy previously provided relating to B-BBEE? <i>If yes, please provide name of consultant / company below;</i>		

13.2 When does your current certificate expire?	Date:
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13.3 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)
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Kindly return by e mail to: prem@beerated.org

Section 14. ACCEPTANCE

(For BEE RATED'S internal use only)

CHECKED BY:
Verification Manager

Date:

Quoted Price:

ACCEPTED: YES / NO

IF NO, provide reasons: