



REQUISITION FOR QUOTATION (RFQ)

RFQ NO: 099/2025/HR&OD/REWARDS/RFQ

APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE EXPERT TOTAL REWARDS (FIXED AND VARIABLE PAY) ADVISORY SERVICE TO TCTA FOR A PERIOD OF 12 MONTHS

DESCRIPTION: (AS PER PROCUREMENT PLAN)	Appointment of a service provider to provide expert total rewards (fixed and variables pay) advisory service to TCTA for a period of 12 months.
DURATION:	12 months
PROPOSED BID PROCESS:	RFQ
BRIEFING SESSION DATE AND TIME:	N/A
CLARIFICATION DEADLINE:	03 March 2026 @ 11H00 a.m.
ISSUE DATE:	25 February 2026
CLOSING DATE:	6 March 2026
BID VALIDITY PERIOD:	30 days
ENQUIRIES:	tenders06@tcta.co.za
SUBMISSION OF PROPOSALS:	tenders06@tcta.co.za

BACKGROUND

TCTA is a South African public sector entity that implements bulk raw water infrastructure development on behalf of the Department of Water and Sanitation. It was established by Notice No. 2631 published in Government Gazette No. 10545 dated 12 December 1986 (as amended by Notice No. 277 published in Government Gazette No. 21017 dated 24 March 2000) (The Notice of Establishment), promulgated in terms of Chapter 10 of the National Water Act, 1998 and is listed in Schedule 2 of the Public Finance Management Act, 1999, (PFMA).

TCTA seeks the services of a qualified external party to conduct general advisory and expert Total

BACKGROUND

Rewards Services. e.g. Benchmarking of Salaries, Employee Benefits and Variable Pay/Incentives, Job Evaluation, Compensation analysis Salary and Wage movements data and remuneration advisory services but not limited to.

For example:

- This service is required to align with the commitment made to the Board to conduct a benchmark study every 3 years as contained in the Remuneration Policy.
- On an annual basis, TCTA management requests from the Board a salary mandate in preparation for salary negotiations. Various variables are used to formulate the annual salary adjustment mandate, and TCTA requires survey data about historic and projected adjustments in the public and private sectors.
- The use of external service providers is to ensure the independence, validity and reliability of the grading, data analysis and reporting on market findings.

SCOPE OF WORK

This request is to procure a service provider for a contract period of one year.

The service provider must provide TCTA with a detailed project management plan, including an outline of the roles and responsibilities that the various TCTA stakeholders (Executives, line management, HR, employees, and labour) should fulfill in the project, in line with the identified timelines. The service provider must outline key activities and roles in line with a Project Management Approach they intend to adopt.

1. Supply the Project Management Plan with milestones
2. Provide market information on salary and wage movements indicative of pre and post-salary increases based on Paterson grading A - F
3. Conduct benchmarking on Salaries, Benefits and Variable pay
4. Job Evaluation/grading of positions as and when business requires
5. Annual Remuneration report
6. Annual Increase Report
7. Provide market trends on Wage and Race Gap Analysis
8. Review of total rewards strategy, policies and procedures
9. Conduct a staff cost affordability assessment¹⁰
10. Conduct a comparative study on non-monetary rewards
11. Provide ad-hoc remuneration advice
12. Present findings on the above to ExCo / Board and Board HR Sub Committee and EESD Committee and Bargaining Forum
13. Review the Terms of Reference of the grading committee
14. Establishment and training of the grading committee on Paterson Methodology.

SCOPE OF WORK

15. Skills transfer to internal employees.

This is an expert advisory service. The service provider is expected to use best practice norms and standards and use reliable and valid survey data from the private and public sectors. The service provided must be independent, valid and reliable. The advice must be set in the principles of fairness and non-discriminatory labour practices as guided by local laws and international norms.

COMPANY EXPERIENCE REQUIRED

The Company must have completed a minimum of five projects in Total Rewards. For each Rewards Project Completed, a copy of reference letter on client letterhead must be submitted (TCTA reserves the right to contact the clients to verify the documentation provided) e.g. Remuneration analysis, employee benefits, variable pay (STI and LTI), job evaluation, benchmarking comparative studies not limited to, as per the scope of work in the public, private and State-Owned Entities with access to reliable and valid data points.

PERSONNEL EXPERIENCE REQUIRED

1. Master Reward Specialist as the Project Leader x1

The Project Leader should have a Master Reward Specialist Designation as per the South African Reward Association.

2. Remuneration Specialist x 2

Two (2) Remuneration Specialists should have the Reward Specialist designation as per the South African Reward Association.

DELIVERABLES

1. Project Management Plan with milestones
2. Market information on salary and wage movements indicative of pre and post-salary increases based on Paterson grading A - F
3. Benchmarking report on Salaries, Benefits and Variable pay
4. Job Evaluation/grading reports of positions as and when business requires
5. Annual Remuneration report
6. Annual Increase Report
7. Market trends report on Wage and Race Gap Analysis
8. Review report of total rewards strategy, policies and procedures
9. Staff cost affordability assessment¹⁰ report
10. Comparative study report on non-monetary rewards
11. Ad-hoc remuneration advisory
12. Presentation on findings on the above to ExCo / Board and Board HR Sub Committee

DELIVERABLES	
and EESD Committee and Bargaining Forum	
13.	Review the Terms of Reference of the grading committee
14.	Establishment and training of the grading committee on Paterson Methodology
15.	Skills transfer to internal employees
INDICATIVE PROGRAMME	
DESCRIPTION OF ACTIVITY	TIMELINES
1. Project Management Plan with milestones	03/2026
2. Salary and wage movement Benchmarking	06/2026
3. Salary, Benefits and Variable Pay benchmarking	03/2026
4. Grading of Positions and Individual Reports	As and when required
5. Annual Remuneration Report Review	03/2026
6. Annual increase analysis report	07/2026
7. Wage Gap and Race analysis and research international standards	06/2026
8. Review of Total Rewards Strategy, policies and procedures	03/2026
9. Staff cost affordability assessment report	05/2026
10. Non-monetary comparative study benchmarking	03/2026
11. Ad-hoc remuneration advice	On-going
12. Presentation to Executive Committee and TCTA Board Committee and Employment Equity and Skills Development Committee	04 & 07 /2026
13. Review Terms of Reference of Grading Committee	05/2026
14. Establish and train the grading committee	06/2026
15. Skills transfer to internal employees	On-going

RETURNABLES	
MANDATORY	NON-MANDATORY
1. Company Experience	
The Company must have completed a minimum of five projects in Total Rewards. For each Rewards Project completed, ANNEXURE A must be fully completed and submitted. Projects listed under ANNEXURE A must indicate the following: Job Evaluation and Benchmarking. e.g. Remuneration analysis, employee benefits, variable pay (STI and LTI), job evaluation, comparative studies not limited to, as per the scope of work in the public, private and State-Owned Entities with access to reliable and valid data points. No points will be allocated for an incomplete or a partially completed form ANNEXURE A. Alternatively, bidders may submit five (5) signed reference letters for five (5) projects related to Remuneration. Only signed reference letters on the client's official letterhead, containing full contact details, will be considered. Each reference letter must clearly indicate the following: Job Evaluation and Benchmarking. e.g. Remuneration analysis, employee benefits, variable pay (STI and LTI), job evaluation, comparative studies not limited to, as per the scope of work in the public, private and State-Owned Entities with access to reliable and valid data points for consideration. NB: TCTA reserves the right to contact the clients to verify the information provided	CSD proof of registration
2. Project Leader:	
Master Reward Specialist: Fully completed Annexure B must be submitted for Master Reward Specialist as the Project Leader x1.	Fully Completed and Signed SBD 4 Form SCM Bidding Forms: SBD1, & SBD 6.1

RETURNABLES	
MANDATORY	NON-MANDATORY
The Project Leader should have a Master Reward Specialist Designation as per the South African Reward Association. Failure to submit a certificate confirming that the proposed resource has a Master Reward Specialist Designation will result in disqualification.	
3. Reward Specialist x 2: Fully completed Annexure C1 & C2 for each of the specialists must be submitted Two (2) Remuneration Specialists should have the Reward Specialist designation as per the South African Reward Association Failure to submit a certificate confirming that the proposed resource has a Reward Specialist Designation will result in disqualification. <i>No points will be allocated if ANNEXURE C1 & C2 are not fully completed</i>	Valid BBBEE Certificate issued by the Verification Agency accredited by SANAS, Valid DTIC BBBEE Certificate, Valid Sworn Affidavit for EME or QSE, Consolidated BBBEE for Joint Venture issued by a Verification Agency accredited by SANAS. No points will be awarded if the bidders' Sworn Affidavit does not comply with the requirements outlined in ANNEXURE D

TRANSFORMATION GOALS
N/A

SPECIFIC GOALS	
The below table will be used to calculate the score out of 20 for preference points: -	
B-BBEE Status Level of Contributor	Number of Points
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

Any bidder who fails to meet the specific goals will not be disqualified from the process and will score 0 for Specific Goals. NB - Bidders must submit valid certified copies of their B-BBEE Certificates/Sworn Affidavits which stipulates their B-BBEE Status Level of Contributor to claim preference points. Furthermore, no points will be awarded if the bidders' Sworn Affidavit does not comply with the requirements outlined in **ANNEXURE D**

PREFERENTIAL POINTS

Preferential Points Calculation - The weighting of the Preferential points calculation is as follows:

Price	=	80
Specific Goals	=	20
Total Score	=	100

TERMS AND CONDITIONS

TCTA'S Standard Conditions of Bid shall apply to this bid. TCTA reserves the right to cancel or not to award this bid in accordance with its standard Conditions of Bid. Bidders can obtain TCTA's standard conditions of bid upon request or on TCTA's website

PROPOSED FUNCTIONALITY CRITERIA

Section	FUNCTIONAL CRITERIA	MAX SCORE
1. Company experience : Annexure A or reference letters to be considered	The bidder must have completed a minimum of 5 projects in total rewards (Job evaluation, benchmarking). Points will be allocated as follows: 5 successfully completed total rewards projects = 20 - Less than 5 successfully completed total rewards projects with corresponding proof of reference letters: 0	20
2. Project Leader x1	The Project Leader should have a Master Reward Specialist designation as per the South African Reward Association (SARA) with fully completed ANNEXURE B Point allocation: <u>Years of Work Experience as a Master Reward Specialist:</u> 13 or more years of experience: 10 points 12 years of work experience: 5 points - Less than 12 years: 0 points Bidders must complete Annexure B fully. No points will be awarded if Annexure B is not completed.	10
3. Reward Specialist x 2	Both Reward Specialists must have the Reward	20

PROPOSED FUNCTIONALITY CRITERIA

Section	FUNCTIONAL CRITERIA	MAX SCORE
	Specialist designation as per the South African Reward Association with fully completed ANNEXURE C Point allocation: for Reward Specialists (C1) <u>Years of Work Experience as a Remuneration Specialists:</u> • 6 or more years of experience: 10 points • 5 years of work experience: 5 points • Less than 5 years: 0 points Bidders must complete Annexure C1 fully . No points will be rewarded if Annexure C1 is not fully completed. Point allocation: for Reward Specialists (C2) <u>Years of Work Experience as a Remuneration Specialist:</u> • 6 or more years of experience: 10 points • 5 years of work experience: 5 points • Less than 5 years: 0 points Bidders must complete Annexure C2 Fully . No points will be awarded if Annexure C2 is not fully completed.	
	TOTAL	50

NB - Bidders must obtain a minimum of thirty-five (35) points out of Fifty (50) points to qualify for evaluation on Price and Specific Goals. Bidders that score less than 40 points for functionality will be disqualified at this stage.

PROPOSED PRICING SCHEDULE

Item	Unit Price	Projected	Price excluding VAT
Presentation at Exco/ Board/Board sub-committee/ EESD Committee and Bargaining Forum meetings		2 reports	
Annual Remuneration Report Annual increase analysis report		1 report	
Wage Gender and Race Gap Analysis		1 Report	
Salary, Benefits and Variable Benchmarking report		1 report	
Review of total rewards strategy, policies and procedures		1 report (unless legislation changes)	
Staff cost affordability assessment and report		1 report per	

PROPOSED PRICING SCHEDULE

Non-monetary rewards comparative study		1 report	
Ad-hoc remuneration advice		3 reports	
Grading of the position and report for each position as business requires		50 positions (multiplied by rate per position required)	
A survey report on salary and wage movements in the national market, indicative of pre and post-salary increases based on Paterson grading A – F.		1 report	
Presentation at Exco/ Board/Board sub-committee/ EESD Committee and Bargaining Forum meetings		2 reports	
Annual Remuneration Report Annual increase analysis report		1 report	
Wage Gender and Race Gap Analysis		1 Report	
Salary, Benefits and Variable Benchmarking report		1 report	
Review of total rewards strategy, policies and procedures		1 report (unless legislation changes)	
Staff cost affordability assessment and report		1 report per	
Non-monetary rewards comparative study		1 report	
Ad-hoc remuneration advice		3 reports	
Establishment and training of grading committee (online Training)		2 sessions (Group of 20)	
Review grading committee terms of reference		Once off	
Sub total			
15% Vat			
TOTAL			

NB : Bidders will invoice based on the actual number of positions graded. Bidders must price each line item.

Price must be reflected Excluding and Including VAT

All prices must include disbursements

Prices must be firm and unconditional.

ANNEXURES	
A	COMPANY EXPERIENCE
B	FORM A FOR MASTER REWARD SPECIALIST: PROJECT LEADER
C	FORM C1 & C2 FOR REWARD SPECIALISTS
D	B-BBEE SWORN AFFIDAVIT REQUIREMENTS FOR EME AND QSE
E	SBD 1 – INVITATION TO BID
F	SBD 4 – BIDDERS DISCLOSURE
G	SBD 6.1 – IN TERMS OF PPR 2022

ANNEXURE A: COMPANY EXPERIENCE:

CV TEMPLATE FOR COMPANY EXPERIENCE

CLIENT	PROJECTS DESCRIPTIONS	START DATE (INDICATE THE MONTH AND YEAR)	END DATE (INDICATE THE MONTH AND YEAR)	NAME & SURNAME OF CONTACT PERSON	CONTACT DETAILS : EMAIL AND TELEPHONE NUMBER

NB: No points will be allocated if this table is not completed in full. No points will be allocated for self-created templates.

SIGNATURE: NAME OF BIDDER: (of person authorized to sign on behalf of the company)

ANNEXURE B: MASTER REWARD SPECIALIST QUALIFICATIONS AND EXPERIENCE:**CV TEMPLATE FOR PROJECT LEADER: MASTER REWARD SPECIALIST**

Name and Surname of Resource
Highest Academic Qualifications (<i>Qualification name and NQF level</i>)
Total Relevant Year of Experience <i>(Indicate total years of experience in Total Rewards)</i>

EMPLOYER/ CLIENT	RELEVANT EXPERIENCE	START DATE (INDICATE THE MONTH AND YEAR)	END DATE (INDICATE THE MONTH AND YEAR)	NAME & SURNAME OF CONTACT PERSON	CONTACT DETAILS : EMAIL AND TELEPHONE NUMBER

NB: No points will be allocated if this table is not completed in full. No points will be allocated for self-created templates.

SIGNATURE: NAME OF BIDDER: person authorised to sign on behalf of the Bidder)

ANNEXURE C1: REWARD SPECIALIST QUALIFICATIONS AND EXPERIENCE:**CV TEMPLATE FOR PROJECT PERSONNEL: REWARD SPECIALIST**

Name and Surname of Resource
Highest Academic Qualifications (<i>Qualification name and NQF level</i>)
Total Relevant Year of Experience <i>(Indicate total years of experience in Total Rewards)</i>

EMPLOYER/ CLIENT	RELEVANT EXPERIENCE	START DATE (INDICATE THE MONTH AND YEAR)	END DATE (INDICATE THE MONTH AND YEAR)	NAME & SURNAME OF CONTACT PERSON	CONTACT DETAILS : EMAIL AND TELEPHONE NUMBER

NB: No points will be allocated if this table is not completed in full. No points will be allocated for self-created templates.

SIGNATURE: NAME OF BIDDER: person authorised to sign on behalf of the Bidder)

ANNEXURE C2: REWARD SPECIALIST QUALIFICATIONS AND EXPERIENCE:**CV TEMPLATE FOR PROJECT LEADER: REWARD SPECIALIST**

Name and Surname of Resource
Highest Academic Qualifications (<i>Qualification name and NQF level</i>)
Total Relevant Year of Experience <i>(Indicate total years of experience in Total Rewards)</i>

EMPLOYER/ CLIENT	RELEVANT EXPERIENCE	START DATE (INDICATE THE MONTH AND YEAR)	END DATE (INDICATE THE MONTH AND YEAR)	NAME & SURNAME OF CONTACT PERSON	CONTACT DETAILS : EMAIL AND TELEPHONE NUMBER

NB: No points will be allocated if this table is not completed in full. No points will be allocated for self-created templates.

SIGNATURE: NAME OF BIDDER: person authorised to sign on behalf of the Bidder)

ANNEXURE D: B-BBEE SWORN AFFIDAVIT REQUIREMENTS FOR EME AND QSE

The following information is required for the Sworn Affidavits to be valid: -

1. Name/s of deponent as they appear in the identity document and the identity number;
2. Designation of the deponent as either the director, owner or member must be indicated in order to know that person is duly authorised to depose of an affidavit;
3. Name of enterprise as per enterprise registration documents issued by the CIPC, where applicable, and enterprise business address.;
4. Percentage of black ownership, black female ownership and designated group. In the case of specialised enterprises as per Statement 004, the percentage of black beneficiaries must be reflected;
5. Indicate total revenue for the latest financial year and whether it is based on audited financial statements or management accounts;
6. Full financial year end as per the enterprise's registration documents, which was used to determine the total revenue. Example 28 February 2022;
7. B-BBEE Status level. An enterprise can only have one status level;
8. Nature of business;
9. VAT Number;
10. Date deponent signed and date of Commissioner of Oath must be the same;
11. Commissioner of Oath cannot be an employee or ex officio of the enterprise because, a person cannot by law, commission a sworn affidavit in which they have an interest;
12. Correct Sector Codes Affidavit to be used.

**PART A
INVITATION TO BID**

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (TCTA)							
BID NUMBER:		CLOSING DATE:		CLOSING TIME:			
DESCRIPTION							
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)							
tenders06@tcta.co.za							
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO				TECHNICAL ENQUIRIES MAY BE DIRECTED TO:			
CONTACT PERSON	Tefo			CONTACT PERSON			
TELEPHONE NUMBER	N/A			TELEPHONE NUMBER	N/A		
FACSIMILE NUMBER	N/A			FACSIMILE NUMBER	N/A		
E-MAIL ADDRESS	tenders06@tcta.co.za			E-MAIL ADDRESS	tenders06@tcta.co.za		
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		
1. ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	☐ Yes ☐ No [IF YES ENCLOSE PROOF]		2. ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES 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.							

PART B

TERMS AND CONDITIONS FOR BIDDING

3. 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, 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).**

4. 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:

BIDDER'S DISCLOSURE**1. 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.

2. Bidder's declaration

- 2.1 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**

- 2.1.1 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

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

- 2.2.1 If so, furnish particulars:

.....

- 2.3 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**

- 2.3.1 If so, furnish particulars:

.....

¹ the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

3 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.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 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

² Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

**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:

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

1.2 **To be completed by the organ of state**

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

1.3 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.

1.4 **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

1.5 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.

1.6 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

- (a) **“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;
- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;

- (c) “**rand value**” means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) “**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
- (e) “**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 OR 90/10 PREFERENCE POINT SYSTEMS

A maximum of 80 or 90 points is allocated for price on the following basis:

$$\begin{array}{ccc} \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\ \mathbf{Ps} = \mathbf{80} \left(\mathbf{1} - \frac{\mathbf{Pt} - \mathbf{Pmin}}{\mathbf{Pmin}} \right) & \mathbf{or} & \mathbf{Ps} = \mathbf{90} \left(\mathbf{1} - \frac{\mathbf{Pt} - \mathbf{Pmin}}{\mathbf{Pmin}} \right) \end{array}$$

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 or 90 points is allocated for price on the following basis:

$$\begin{array}{ccc} \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\ \mathbf{Ps} = \mathbf{80} \left(\mathbf{1} + \frac{\mathbf{Pt} - \mathbf{Pmax}}{\mathbf{Pmax}} \right) & \mathbf{or} & \mathbf{Ps} = \mathbf{90} \left(\mathbf{1} + \frac{\mathbf{Pt} - \mathbf{Pmax}}{\mathbf{Pmax}} \right) \end{array}$$

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 90/10 and 80/20 preference point system.

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

(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.

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	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)
BBBEE-LEVEL		
1	20	
2	18	
3	14	
4	12	
5	8	
6	6	
7	4	
8	2	
Non-compliant contributor	0	

DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name of company/firm.....

4.4. Company registration number:

4.5. 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]

4.6. 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;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) 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;
- iv) 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:	