REQUEST FOR QUOTATION (RFQ)

RFQ NO: 108/2026/EWSS/CMS/RFQ

APPOINTMENT OF INFORMATION TECHNOLOGY CHANGE MANAGEMENT SPECIALIST FOR A PERIOD OF SIX (6) MONTHS

DESCRIPTION:	Appointment of IT Change Management Specialist for a period of six (6) months
DURATION:	6 Months
PROPOSED BID PROCESS:	RFQ
DIVISION UNIT:	EWSS
ISSUE DATE:	15 October 2026
CLARIFICATIONS DEADLINE:	20 October 2026 @ 14:00 p.m.
CLOSING DATE:	22 October 2026 @ 11:00 a.m.
RFQ VALIDITY PERIOD	30 Days (from RFQ closing date)
SUBMISSION OF PROPOSALS:	tenders05@tcta.co.za
ENQUIRIES	tenders05@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 is currently implementing a number of strategic ICT and digital transformation initiatives aimed at improving operational efficiency, governance, compliance, reporting capabilities, and service delivery across the organisation. These initiatives include the implementation of new business systems, process improvements, and technology-enabled solutions that require effective stakeholder engagement, communication, training, and user adoption to realize the intended business benefits.

One of the key risks identified in the implementation of TCTA's strategic IT projects is the slow adoption and effective use of new technology by users. Although TCTA continues to invest in new systems, automation and digital capabilities, the intended benefits of these investments may not be fully realised if employees are not adequately prepared, supported and enabled to adopt and effectively use the technology.

This risk is particularly relevant to the EWSS Division, as several strategic initiatives depend on successful technology adoption. Inadequate adoption may result in continued reliance on manual processes, underutilisation of implemented systems, resistance to new ways of working, operational disruption, delayed realisation of project benefits and reduced return on IT investment.
The successful implementation of these initiatives therefore depends not only on the delivery of technology solutions, but also on effectively managing the people, process and adoption impacts associated with technology-driven change. TCTA consequently requires dedicated IT Change Management capability to support strategic ICT initiatives, including the PF&T Compliance Monitoring Solution and other digital transformation projects.

To mitigate this risk, the EWSS Division requires the services of an IT Change Management Specialist to support strategic IT projects and drive technology adoption across the organisation. The specialist will work closely with IT project teams, business process owners, HR and other stakeholders to assess technology-related change impacts, identify affected user groups, evaluate organisational and user readiness, facilitate stakeholder engagement, develop targeted communication and training interventions, manage resistance, support user adoption, and monitor whether implemented solutions are being used as intended.

IT Change Management is distinct from broader organisational change management because it focuses specifically on the people, process and adoption impacts arising from the implementation of technology. Organisational change management typically addresses wider organisational changes, including restructuring, culture, operating models, roles and organisational design. IT Change Management, by contrast, focuses on preparing and enabling users to transition successfully from existing systems, processes and ways of working to new digital solutions.

The IT Change Management Specialist will therefore not replace the organisation's broader change management function. Rather, the role will provide the specialised technology change and adoption capability required to complement existing organisational change activities and ensure that TCTA's strategic IT investments translate into sustained user adoption, improved digital maturity, realised business benefits and greater value from its technology investments.

SCOPE OF WORK

DETAILED DESCRIPTION OF GOODS/SERVICES

The appointed ICT service provider is required to provide TCTA with a suitably qualified and experienced IT Change Management Specialist. The resources will be required to assist TCTA with Change Management activities and deliverables for ICT Strategic projects. The IT Change Management Specialist will be required to develop and execute change management strategies, assess change impact, ensure effective communication, and drive user readiness and adoption of new digital solutions.

The IT Change Management Specialist will also be responsible for facilitating stakeholder engagement activities, monitoring user adoption, and supporting post-implementation change activities where required.

The typical deliverables include the following:

Deliverable	Purpose / Expected Output
1. **IT Change Management Strategy and Plan**	Develop an IT change management approach aligned with the portfolio of strategic ICT projects, including methodology, activities, timelines, responsibilities and success measures.
2. **Change Impact Assessment**	Assess how each technology initiative affects employees, roles, processes, systems and ways of working, including the extent of change for different stakeholder groups.
3. **Stakeholder Analysis and Engagement Plan**	Identify affected stakeholders, assess their influence and level of impact, and establish appropriate engagementinterventions throughout implementation.
4. **IT Change Readiness Assessment**	Assess organisational and user readiness for new systems and identify gaps that could affect implementation or adoption.
5. **User Adoption Strategy and Plan**	Define how users will be moved from current practices to effective use of the new technology, including interventions for low-adoption areas.
6. **Change Communication Plan and Materials**	Develop targeted communications explaining what is changing, why it is changing, when it will happen, how users will be affected and what support will be available.
7. **Training Needs Assessment and Training Plan**	Determine user competency requirements and coordinate role-based training, user guides, demonstrations and other learning interventions.
8. **Change Resistance Management Plan**	Identify sources of resistance, adoption barriers and stakeholder concerns, and implement targeted interventions to address

	them.
9. **Change Champion / Super-User Network**	Establish and support business change champions or super-users who can promote adoption and provide first-line support within business areas.
10. **Go-Live Readiness Assessment**	Assess whether affected users and business areas are ready for go-live from a people and adoption perspective and identify outstanding actions and risks.
11. **Post-Go-Live Adoption Support Plan**	Provide structured support after implementation, including user engagement, refresher training, issue identification and reinforcement activities.

COMPANY EXPERIENCE REQUIRED

The bidders shall have done a minimum of three (3) change management projects for corporate clients. **They must also submit a minimum of 3 reference letters for similar work done in the past 10 years. Alternatively, bidders must complete Form A: schedule of the bidder's experience. Reference letters must contain all the information stipulated in Annexure A.**

PERSONNEL EXPERIENCE REQUIRED

The IT Management Specialist must have a three-**year Bachelor's Degree in Computer Science, Information Technology, Business Administration, or a related field** and at least five (5) years of experience developing and executing end-to-end Change Management for ICT or digital transformation initiatives, supporting IT system implementations, automation, digital transformation, or other technology-enabled business

DELIVERABLES

.The service provider must provide the following personnel to TCTA per the scope.

- 1 x IT Change Management Specialist

The resource will be expected to produce the deliverables identified within the scope of work, including change management plans, stakeholder engagement plans, communication plans, training plans, readiness assessments, and benefits realization reporting

RETURNABLES

MANDATORY	NON-MANDATORY
Fully Completed Pricing Schedule as incorporated in the RFQ document	SCM Bidding Forms: SBD1, SBD 4 & SBD 6.1 must be fully completed and signed.
<u>Professional membership / Affiliation:</u> Bidders must submit a recognised Change Management certification, such as Prosci Change	A valid BBBEE Certificate issued by a Verification Agency Accredited by SANAS, or a Sworn Affidavit for EME and QSE. Consolidated BBBEE for Joint Venture

Management Certification, APMG Change Management Practitioner, or an equivalent certification of the proposed IT Change Management Specialist.	tenderers issued by Agency Accredited by SANAS, or a Sworn Affidavit for EME and QSE **(Refer to Annexure F and G). Bidders must complete one of the Sworn Affidavit applicable to their company (EME/QSE).** **No points will be awarded if the bidders' Sworn Affidavit does not comply with the minimum requirements for Valid Sworn Affidavits outlined in ANNEXURE B**.
	CSD Registration Report
BIDDERS WHO FAIL TO SUBMIT ANY MANDATORY REQUIREMENTS WILL NOT BE CONSIDERED FOR FURTHER EVALUATION.	

FUNCTIONAL CRITERIA		
Role	**Mandatory qualification and experience Requirements**	**Points**
Bidder's experience: Signed reference letters, Alternatively **Form A**	The bidders shall have done a minimum of three (3) change management projects for corporate clients The points will be allocated as follows: • Less than three (3) references in the last 10 years = **0 points** • 3 references in the last ten (10) years = **12 points** • More than 3 references in the last ten (10) years = **20 points** Bidders must submit signed reference letters on their client letterhead. Alternatively, bidders must complete Form A: schedule of the bidder's experience. Reference letters must contain all the information stipulated in Annexure A.	20
IT Change Management Specialist	• The IT Management Specialist must have a **three-year Bachelor's Degree in Computer Science, Information Technology, Business Administration, or a related field** and less than 5 years of experience in developing and executing end-to-end Change Management for ICT or digital transformation initiatives, supporting IT system implementations, automation, digital transformation, or other technology-enabled business change= **0 points** • The IT Management Specialist must have a **three-year Bachelor's Degree in Computer Science, Information Technology, Business Administration, or a related field** and 5 to 8 years of experience in developing and executing	20

	end-to-end Change Management for ICT or digital transformation initiatives, supporting IT system implementations, automation, digital transformation, or other technology-enabled business change = **15 points** • The IT Management Specialist must have a **three-year Bachelor's Degree in Computer Science, Information Technology, Business Administration, or a related field** and more than 9 years experience or more in developing and executing end-to-end Change Management for ICT or digital transformation initiatives, supporting IT system implementations, automation, digital transformation, or other technology-enabled business change = **20 points**	
	Total	40

Bidders must obtain a minimum of 27 points out of 40 points to be considered for the next stage of price and preference evaluation.

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 B. Where a B-BBEE Certificate is issued by a withdrawn verification agency, no points will be awarded as the B-BBEE Certificate will be deemed invalid.

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.

ANNEXURES

A	PERSONNEL EXPERIENCE
B	B-BBBEE SWORN AFFIDAVIT REQUIREMENTS FOR EME AND QSE
C	SBD 1 – INVITATION TO BID
D	SBD 4 – BIDDERS DISCLOSURE
E	SBD 6.1 – IN TERMS OF PPR 2022
F	SWORN AFFIDAVIT – B-BBEE EXEMPTED MICRO ENTERPRISE
G	SWORN AFFIDAVIT – B-BBEE QUALIFYING SMALL ENTERPRISE

PROPOSED PRICE QUOTATION
APPOINTMENT OF IT CHANGE MANAGEMENT SPECIALIST FOR A PERIOD OF 6 MONTHS

Service		Quantity	Hourly Rate	Total Price for 6 months
IT Change Management Specialist		1	R	R
	Subtotal			**R**
	15% VAT			**R**
	Total			**R**

PRICING INSTRUCTIONS

- Bidders will be appointed based on an agreed rate for the duration of their appointment
- The successful bidder must submit signed timesheets with every invoice indicating the agreed rate
- The pricing must be market related.
- Prices must be firm and unconditional..

NOTES TO BIDDERS

TCTA will evaluate all Bid Submissions according to the Preferential Procurement Policy Framework Act, No.5 of 2000 (PPPFA).

If the price offered by the highest scoring bidder is not market-related, TCTA reserves the right not to award to that bidder in terms of its Procurement policies.

ANNEXURE A - PERSONNEL EXPERIENCE

FORM A – IT Change Management Specialist

CV template for personnel (NO POINTS WILL BE ALLOCATED IF START & END DATES IN MONTHS & YEARS ARE NOT PROVIDED)

Name of IT Change Management Specialist	
Has a Bachelor's degree and a Change Management certificate (s)? (Yes/No)? If yes, attach a copy.. **NB Failure to submit a copy of the certificate(s) will result in the bidder scoring zero (0) for this section	

		Work Experience (indicate the months and years)				
EMPLOYER/CLIENT	**WORK SCOPE**	**Start Date (month & year)**	**End Date (month & year)**	**NAME & SURNAME OF CONTACT**	**CONTACT NUMBER**	**EMAIL ADDRESS**

ANNEXURE B: 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.

ANNEXURE C **SBD 1**

PART A
INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (*NAME OF DEPARTMENT/ PUBLIC ENTITY*)					
BID NUMBER:	**108/2026/EWSS/CMS/RFQ**	CLOSING DATE:	**22 October 2026**	CLOSING TIME:	**11:00 A.M.**
DESCRIPTION	**APPOINTMENT OF IT CHANGE MANAGEMENT SPECIALIST FOR A PERIOD OF 6 MONTHS**				

BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT *(STREET ADDRESS)*
tenders05@tcta.co.za

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO		TECHNICAL ENQUIRIES MAY BE DIRECTED TO:	
CONTACT PERSON	**RECEIVING OFFICER**	CONTACT PERSON	**RECEIVING OFFICER**
TELEPHONE NUMBER	**N/A**	TELEPHONE NUMBER	**N/A**
FACSIMILE NUMBER	**N/A**	FACSIMILE NUMBER	**N/A**
E-MAIL ADDRESS	tenders05@tcta.co.za	E-MAIL ADDRESS	tenders05@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: ……

ANNEXURE D **SBD 4**

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**

---

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.

2.3.1 If so, furnish particulars:
…….
…….

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.

---

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.

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

ANNEXURE E **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:

- 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:

80/20 **or** **90/10**

$$\boldsymbol{Ps = 80\left(1 - \frac{Pt - P\,min}{P\,min}\right)} \quad \text{or} \quad \boldsymbol{Ps = 90\left(1 - \frac{Pt - P\,min}{P\,min}\right)}$$

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

80/20 **or** **90/10**

$$\boldsymbol{Ps = 80\left(1 + \frac{Pt - P\,max}{P\,max}\right)} \quad \text{or} \quad \boldsymbol{Ps = 90\left(1 + \frac{Pt - P\,max}{Pmax}\right)}$$

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 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.*)**

CRITERIA OF SPECIFIC GOALS	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: .....

.....

.....

ANNEXURE F
SWORN AFFIDAVIT – B-BBEE ICT EXEMPT MICRO ENTERPRISE

I the undersigned,

Full name & Surname	
Identity Number	

Hereby declare under oath as follows:

1. The contents of this statement are to the best of my knowledge a true reflection of the facts.

2. I am a ☐ member / ☐ director / ☐ owner of the following enterprise and am duly authorised to act on its behalf:

Enterprise Name	
Trading Name	
Registration Number	
VAT Number	
Nature of Business	
Enterprise Address	

Definition of "Black People"
As per the Broad-Based Black Economic Empowerment Act 53 of 2003 as Amended by Act No 46 of 2013 "Black People" is a generic term which means Africans, Coloureds and Indians –
(a) Who are citizens of the Republic of South Africa by birth or descent; or
(b) Who became citizens of the Republic of South Africa by naturalization
i. Before 27 April 1994; or
ii. On or after 27 April 1994 and who would have been entitled to acquire citizenship by naturalization prior to that date

3. I hereby declare under oath that:

- The Enterprise is _____% Black Owned as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9 (1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013;
- The Enterprise is _____ % Black Woman Owned as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9 (1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013;

- I hereby confirm the above ownership was achieved using the flow through principle.

Definition of "Black Designated Groups"

Black designated groups: Means

a) *Unemployed black people not attending and not required by law to attend an educational institution and not awaiting admission to an educational institution*
b) *Black people who are youth as defined in the National Youth Commission Act of 1996*
c) *Black people who are persons with disabilities as defined in the Code of Good Practice on employment of people with disabilities issued under the Employment Equity Act*
d) *Black people living in rural and under-developed areas*
e) *Black military veterans who qualifies to be called a military veteran in terms of the Military Veterans Act 18 of 2011;*

- The Enterprise is _____% Black Designated Group Owned as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9 (1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013

  - Black Youth % = _____%
  - Black Disabled % = _____%
  - Black Unemployed % = _____%
  - Black People living in Rural areas % = _____%
  - Black Military Veterans % = _____%

- Based on the ☐ Financial Statements/ ☐ Management Accounts and other information available on the latest financial year-end of _____, the annual Total Revenue was R10,000,000.00 (Ten Million Rands) or less
- Please confirm on the table below the B-BBEE level contributor, **by ticking the applicable box.**

100% black owned	**Level One** (135% B-BBEE procurement recognition)	
More than 51% black owned	**Level Two** (125% B-BBEE procurement recognition)	
Less than 51% black owned	**Level Four** (100% B-BBEE procurement recognition)	

3. I know and understand the contents of this affidavit and I have no objection to take the prescribed oath and consider the oath binding on my conscience and on the owners of the enterprise which I represent in this matter.
4. The sworn affidavit will be valid for a period of 12 months from date signed by the commissioner.

Deponent Signature: _____

Date: _____

_____

Commissioner of Oaths
Signature & stamp

ANNEXURE G

SWORN AFFIDAVIT – B-BBEE ICT QUALIFYING SMALL ENTERPRISE

I the undersigned,

Full name & Surname	
Identity Number	

Hereby declare under oath as follows:

1. The contents of this statement are to the best of my knowledge a true reflection of the facts.
2. I am a ☐ member / ☐ director / ☐ owner of the following enterprise and am duly authorised to act on its behalf:

Enterprise Name	
Trading Name	
Registration Number	
VAT Number	
Nature of Business	
Enterprise Address	

Definition of "Black People"

As per the Broad-Based Black Economic Empowerment Act 53 of 2003 as Amended by Act No 46 of 2013 "Black People" is a generic term which means Africans, Coloureds and Indians –

(a) Who are citizens of the Republic of South Africa by birth or descent; or

(b) Who became citizens of the Republic of South Africa by naturalization

i. Before 27 April 1994; or

ii. On or after 27 April 1994 and who would have been entitled to acquire citizenship by naturalization prior to that date

3. I hereby declare under oath that:

- The Enterprise is _____% Black Owned as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9 (1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013;
- The Enterprise is _____ % Black Woman Owned as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9 (1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013;
- I hereby confirm the above ownership was achieved using the flow through principle.

Definition of "Black Designated Groups"

Black designated groups: Means

a) *Unemployed black people not attending and not required by law to attend an educational institution and not awaiting admission to an educational institution*
b) *Black people who are youth as defined in the National Youth Commission Act of 1996*
c) *Black people who are persons with disabilities as defined in the Code of Good Practice on employment of people with disabilities issued under the Employment Equity Act*
d) *Black people living in rural and under-developed areas*
e) *Black military veterans who qualifies to be called a military veteran in terms of the Military Veterans Act 18 of 2011;*

- The Enterprise is _____% Black Designated Group Owned as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9 (1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013

  - Black Youth % = _____%
  - Black Disabled % = _____%
  - Black Umemployed % = _____%
  - Black People living in Rural areas % = _____%
  - Black Military Veterans % = _____%

- Based on the ☐ Financial Statements/ ☐ Management Accounts and other information available on the latest financial year-end of _____, the annual Total Revenue was between R10,000,000.00 (Ten Million Rands) and R50,000,000.00 (Fifty Million Rands)
- Please confirm on the table below the B-BBEE level contributor, **by ticking the applicable box.**

100% black owned	**Level One** (135% B-BBEE procurement recognition)	
More than 51% black owned	**Level Two** (125% B-BBEE procurement recognition)	

3. I know and understand the contents of this affidavit and I have no objection to take the prescribed oath and consider the oath binding on my conscience and on the owners of the enterprise which I represent in this matter.
4. The sworn affidavit will be valid for a period of 12 months from date signed by the commissioner.

Deponent Signature: _____

Date: _____

_____

Commissioner of Oaths
Signature & stamp