REQUEST FOR QUOTATION (RFQ)

RFQ NO: 131/2026/HR&OD/CULTURE/RFQ

APPOINTMENT OF A SERVICE PROVIDER TO ADMINISTER A CUSTOMISED ORGANISATIONAL CULTURE SURVEY BY FEB 2027, INCLUDING DATA ANALYTICS AND INTELLIGENT REPORTING AND RECOMMENDATIONS BASED ON OUTCOMES FOR A PERIOD OF THREE (3) MONTHS

DESCRIPTION:	Appointment of a service provider to administer a customised organisational culture survey by Feb 2027, including data analytics and intelligent reporting and recommendations based on outcomes for a period of three (3) months
DURATION:	Three (3) months
PROPOSED BID PROCESS:	RFQ
DIVISION UNIT:	HR&OD
ISSUE DATE:	11 November 2026
CLARIFICATIONS DEADLINE:	17 November 2026 @ 13:00 p.m.
CLOSING DATE:	20 November 2026 @ 11:00 a.m.
RFQ VALIDITY PERIOD	30 Days (from RFQ closing date)
SUBMISSION OF PROPOSALS:	tenders07@tcta.co.za
ENQUIRIES	tenders07@tcta.co.za

BACKGROUND

TCTA requires the services of a professional research company to design, administer and manage the organisation's culture survey. The request is for the customised survey to be administered to approximately 200 people. The design is to be completed in conjunction with OD personnel. The survey must be able to administer and retrieve submissions online. Expert data analysis using an automated system with multiple reporting required, including presentation of outcomes to EXCO, where applicable, based on outcomes.

SCOPE OF WORK

DETAILED DESCRIPTION OF GOODS/SERVICES

The successful bidder will be required to:

Digital Culture Survey Solution Requirements:

- Develop and administer a digital culture survey solution linked to the current TCTA atmosphere. This should be a complete survey solution and allow customisation by TCTA.
- The survey must be able to identify and measure the key drivers of culture within TCTA.
- The service provider must provide comparative analysis of TCTA's culture driver scores against recognised national and international benchmarks for each measured culture dimension and facilitate feedback presentations to EXCO.
- The service provider must provide a close-out report (The report must contain results, value-add recommendations, impact analysis of current TCTA practices vis-à-vis best practice, etc.), which contains organisational and divisional breakdowns of the analysis per question, as well improvement recommendations plus implementation plans per division and at organisational level. This too must be customisable according to input by TCTA.
- Bidders are strongly encouraged to use specialised survey software and not the generic survey software such as MS Forms, Google Forms, Survey Monkey and others which are widely available on the internet.
- The survey solution must support:
  - Proven advanced analytics: trend analysis, benchmarking against national/international benchmarks, divisional breakdowns.
  - Proven Custom reporting: automated dashboards and exportable reports.
  - Data security & compliance: alignment with POPIA.
  - Scalability: Proven ability to handle large question numbers (e.g. +/- 100 questions) and large respondent groups.
  - Integration: Proven ability to compare with national/international benchmarks.

COMPANY EXPERIENCE REQUIRED

The company must have completed at least a minimum of two (2) projects in conducting climate / culture / engagement or employee opinion surveys in the last 10 years. The bidder must submit a **fully completed and signed Form A OR signed reference letters** on client letterheads demonstrating at least two (2) qualifying projects in conducting climate / culture / engagement or employee opinion surveys in the last 10 years.

PERSONNEL EXPERIENCE REQUIRED

1. The Registered Psychometrist or Psychologist as a lead consultant must have five (5) years' experience in corporate culture, climate or employee engagement surveys with at least two (2) completed projects in the last 10 years, related to corporate culture research, survey methodology, survey implementation, and/or survey reporting.

2. The Data Analyst as a supporting consultant must have two (2) years' experience in corporate culture, climate or employee engagement surveys with at least two (2) completed projects in the last 10 years, related to corporate culture research, survey methodology, survey implementation, and/or survey reporting.

NB: FOR EVALUATION PURPOSES, TCTA ONLY REQUIRES TWO (2) CVS OF KEY RESOURCES NAMELY: REGISTERED PSYCHOMETRIST OR PSYCHOLOGIST AND DATA ANALYST. THEREFORE, BIDDERS ARE REQUIRED TO SUBMIT ONLY TWO (2) CVS AND CLEARLY INDICATE THE DESIGNATIONS OF THE PROPOSED RESOURCES AS STIPULATED ABOVE.

DELIVERABLES
• One (1) Digital culture survey • Design, development and administer a digital culture survey • Data analysis for the survey • Power point feedback sessions to EXCO (These PowerPoint presentations become the property of TCTA) for each survey • Close-Out report for the survey, must have organisational and divisional breakdown analysis with recommendations, as per scope of work.

RETURNABLES	
MANDATORY	**NON-MANDATORY**
Bidders must submit proof of registration or a valid registration certificate for their registered Psychometrist or Psychologist with the Health Professions Council of South Africa (HPCSA)	SCM Bidding Forms: SBD1, SBD 4 & SBD 6.1 must be fully completed and signed, together with the letter of authority or board resolution for the authorised representative.
The bidder must submit a fully completed Pricing Schedule as provided in the RFQ document.	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 tenderers issued by Agency Accredited by SANAS, or a Sworn Affidavit for EME and QSE **(Refer to Annexure E and F). 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 A**.
	CSD Registration Report
	CV of the Registered Psychologist / Psychometrist as a lead consultant must be provided to validate number of years of experience.
	CV of Data Analyst must be provided to validate number of years of experience.
	Form A: Company Experience OR signed reference letters.
	Form B: Personal work experience of the Registered Psychologist/Psychometrist as a lead consultant.
	Form C: Personal work experience of the Data Analyst as the supporting consultant.
BIDDERS WHO FAIL TO SUBMIT ANY MANDATORY REQUIREMENTS WILL NOT BE CONSIDERED FOR FURTHER EVALUATION. ANY BIDDER WHO FAILS TO SUBMIT A NON-MANDATORY DOCUMENT WHERE THAT DOCUMENT IS LINKED TO SPECIFIC EVALUATION CRITERIA WILL NOT BE AWARDED POINTS.	
FUNCTIONAL CRITERIA	

TECHNICAL EVALUATION CRITERIA - PART 1		
Criteria	**Sub Criteria**	**Points**
Company Experience	The company must have completed at least a minimum of two (2) completed projects in the last 10 years in conducting culture / climate / engagement / employee opinion surveys. **A bidder must complete Form A in full or submit signed reference letters to score points as follows:** • A bidder with less than two (2) completed projects in the last 10 years, in conducting culture / climate / engagement / employee opinion surveys **= 0 Points** • A bidder with at least two (2) completed projects in the last 10 years, in conducting culture / climate / engagement / employee opinion surveys **= 15 Points** • A bidder with three (3) or more completed projects in the last 10 years, in conducting culture / climate / engagement / employee opinion surveys **= 30 Points** **NB:** • No points will be allocated if Form A is not completed in full. • No points will be allocated if there are no contactable references under Form A or signed reference letters for a completed project. • TCTA reserves the right to contact these organisations.	**30 Points**
PERSONNEL EXPERIENCE REQUIRED		
Personal experience of the Registered Psychologist/Psychometrist as the lead consultant. **Failure to submit proof of current registration with HPCSA will lead to automatic disqualification.**	The Registered Psychologist/Psychometrist as a lead consultant must have five (5) years' experience in corporate culture, climate or employee engagement surveys with at least a minimum of two (2) completed projects in the last 10 years related to culture research, survey methodology, survey implementation, and/or survey reporting. **A bidder must complete Form B in full to score points as follows:** • The Registered Psychologist / Psychometrist as a lead consultant has less than five (5) years' experience in corporate	**20 Points**

	culture, climate or employee engagement surveys and/or less than two (2) completed projects in the last 10 years, related to culture research, survey methodology, survey implementation, and/or survey reporting **= 0 points** • The Registered Psychologist / Psychometrist as a lead consultant has five (5) years' experience in corporate culture, climate or employee engagement surveys and a minimum of two (2) completed projects in the last 10 years, related to culture research, survey methodology, survey implementation, and/or survey reporting **= 10 points** • The Registered Psychologist / Psychometrist as a lead consultant has six (6) or more years' experience in corporate culture, climate or employee engagement surveys and three (3) or more completed projects in the last 10 years, related to culture research, survey methodology, survey implementation, and/or survey reporting **= 20 points** **NB:** • No points will be allocated if Form B is not completed in full. • CV of the Registered Psychologist / Psychometrist as a lead consultant must be provided to validate number of years of experience. No points will be allocated if CV experience of Lead Consultant does not clearly articulate experience in corporate culture, climate or employee engagement surveys. • No points will be allocated if there are no contactable references for each completed project, under Form B.	

	• TCTA reserves the right to contact these organisations.	
Personal experience of the Data Analyst as the supporting consultant	The Data Analyst as a support consultant must have two (2) years' experience in corporate culture, climate or employee engagement surveys with at least a minimum of two (2) completed projects in the last 10 years related to culture research, survey methodology, survey implementation, and/or survey reporting. **A bidder must complete Form C in full to score points as follows:** • The Data Analyst as a support consultant has less than two (2) years' experience in corporate culture, climate or employee engagement surveys and/or less than two (2) completed projects in the last 10 years related to culture research, survey methodology, survey implementation, and/or survey reporting **= 0 Points** • The Data Analyst as a support consultant has two (2) years' experience in corporate culture, climate or employee engagement survey with a minimum of two (2) completed projects in the last 10 years related to culture research, survey methodology, survey implementation, and/or survey reporting **= 10 Points** • The Data Analyst as a support consultant has three (3) or more years' experience in corporate culture, climate or employee engagement surveys and with three (3) or more completed projects in the last 10 years related to culture research, survey methodology, survey implementation, and/or survey reporting **= 20 Points** NB: • No points will be allocated if Form C is not completed in full in respect of the references provided.	**20 Points**

	• CV of Data Analyst must be provided to validate number of years of experience. No points will be allocated if CV experience of Data Analyst does not clearly articulate experience in corporate culture, climate or employee engagement surveys. • No points will be allocated if there are no contactable references for each completed project, under Form C. • TCTA reserves the right to contact these organizations.	
Total points		**70**

BIDDERS MUST OBTAIN A MINIMUM OF 35 POINTS OUT OF 70 POINTS TO ADVANCE TO THE NEXT STAGE OF SURVEY SOFTWARE DEMONSTRATION. BIDDERS THAT SCORE LESS THAN 35 POINTS FOR FUNCTIONALITY WILL BE DISQUALIFIED AT THIS STAGE.

TECHNICAL EVALUATION CRITERIA - PART 2

BIDDERS WHO MEET THE MINIMUM SCORE OF 35 POINTS ON PART 1 OF THE TECHNICAL CRITERIA WILL BE INVITED TO DEMONSTRATE THE SURVEY SOFTWARE THEY WILL BE USING. THE SOFTWARE WILL BE SCORED AS FOLLOWS

Item No	Description	Points
1	**Available automated analytics**	**10**
2	**Available automated reports and customizability**	**5**
3	***Scalability: Ability to handle large questionnaire numbers (e.g. +/- 100 questions) and large respondent groups***	**5**
4	***Integration: Proven ability to compare with national / international benchmarks***	**10**
Total Score		**30**

BIDDERS MUST SCORE FULL 30 POINTS TO QUALIFY FOR EVALUATION ON PRICE AND SPECIFIC GOALS. BIDDERS THAT SCORE LESS THAN 30 POINTS FOR FUNCTIONALITY ON PART 2 WILL BE DISQUALIFIED AT THIS STAGE.

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

PRICING SCHEDULE

APPOINTMENT OF A SERVICE PROVIDER TO ADMINISTER A CUSTOMISED ORGANISATIONAL CULTURE SURVEY BY FEB 2027, INCLUDING DATA ANALYTICS AND INTELLIGENT REPORTING AND RECOMMENDATIONS BASED ON OUTCOMES FOR A PERIOD OF THREE (3) MONTHS

Items	Description of services	Quantity	Unit Price (VAT Excl)	Total Cost for three (3) Months
1	Design and development of a digital culture "pulse" survey solution	**1**	R	R
2	Implementation and management of a digital culture "pulse" survey solution	**1**	R	R
3	Data analysis of pulse survey	**1**	R	R
4	Culture survey PowerPoint feedback session to EXCO.	**1**	R	R
5	Culture survey close-out report with recommendations and analyses per division and for organisation	**1**	R	R
SUB-TOTAL				**R**
VAT@15%				**R**
TOTAL Bid PRICE FOR THE PERIOD OF THREE (3) MONTHS				**R**

Pricing instruction:

- 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.
- Price must be reflected Excluding and Including VAT.
- All prices must include disbursements.
- Prices must be firm and unconditional.

FORM A: COMPANY EXPERIENCE

Instruction To bidders

a) Bidders are to list at least two (2) of their completed projects below within the past 10 years. No points will be allocated for less than two (2) completed projects.

b) The form must be completed in full and signed; no points will be allocated for an incomplete or a partially completed form. Refer to the example below for a fully completed form.

Items	Client Name	Description of project/s completed within culture research, survey methodology, survey implementation, and/or survey reporting	Project start date (dd/mm/yy)	Project end date (dd/mm/yy)	Contact person	Contact number	Email address	Reference Letters attached (Yes or No)
E.g	ABC (Pty) Ltd	Provision of survey reporting	1 June 2025	31 July 2026	John Cole	012 111 111	john@abc.com	Yes
1								
2								
3								
4								
5								
6								

*By signing below, the bidder confirms that the information above is true and correct.

_____

Name and Surname:
Date:

FORM B: PERSONAL WORK EXPERIENCE OF THE REGISTERED PSYCHOLOGIST/PSYCHOMETRIST AS A LEAD CONSULTANT

Name: _____ Number of years of culture survey experience (must be verifiable in CV): _____

Instruction To bidders

a) Provide the name of the registered the Registered Psychologist or Psychometrist as a lead consultant and number of years of culture survey experience above.

b) The form must be completed in full and signed; no points will be allocated for an incomplete or a partially completed form. Refer to the example below for a fully completed form.

Items	Client Name	Description of project/s completed within culture research, survey methodology, survey implementation, and/or survey reporting	Project/s focus	Project start date (dd/mm/yy)	Project end date (dd/mm/yy)	Contact person	Contact number	Email address
E.g	ABC (Pty) Ltd	Provision of survey reporting	Organisational culture survey	1 June 2025	31 July 2026	John Cole	012 111 111	john@abc.com
1								
2								
3								
4								

*By signing below, the bidder confirms that the information above is true and correct.

_____

Name and Surname:
Date:

FORM C: PERSONAL WORK EXPERIENCE OF THE DATA ANALYST AS THE SUPPORTING CONSULTANT

Name: _____ Number of years of culture survey experience (must be verifiable in CV): _____

Instruction To bidders

c) Provide the name of the Data Analyst as the supporting consultant and number of years of culture survey experience above.

d) The form must be completed in full and signed; no points will be allocated for an incomplete or a partially completed form. Refer to the example below for a fully completed form.

Items	Client Name	Description of project/s completed within culture research, survey methodology, survey implementation, and/or survey reporting	Project/s focus	Project start date (dd/mm/yy)	Project end date (dd/mm/yy)	Contact person	Contact number	Email address
E.g	ABC (Pty) Ltd	Provision of survey reporting	Organisational culture survey	1 June 2025	31 July 2026	John Cole	012 111 111	john@abc.com
1								
2								
3								
4								
5								

*By signing below, the bidder confirms that the information above is true and correct.

_____

Name and Surname:
Date:

ANNEXURE A: 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 B **SBD 1**

PART A
INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (*NAME OF DEPARTMENT/ PUBLIC ENTITY*)					
BID NUMBER:	**131/2026/HR&OD/CULTURE/RFQ**	CLOSING DATE:	**20 NOVEMBER 2026**	CLOSING TIME:	**11: 00 A.M.**
DESCRIPTION	**APPOINTMENT OF A SERVICE PROVIDER TO ADMINISTER A CUSTOMISED ORGANISATIONAL CULTURE SURVEY BY FEB 2027, INCLUDING DATA ANALYTICS AND INTELLIGENT REPORTING AND RECOMMENDATIONS BASED ON OUTCOMES FOR A PERIOD OF THREE (3) MONTHS**				

BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT *(STREET ADDRESS)*
tenders07@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	tenders07@tcta.co.za	E-MAIL ADDRESS	tenders07@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

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.

contract? **YES/NO**

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 D **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

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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**

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

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**

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

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 E

SWORN AFFIDAVIT – B-BBEE EXEMPTED MICRO ENTERPRISE - GENERAL

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 (**Select one**) of the following enterprise and am duly authorised to act on its behalf:

Enterprise Name:	
Trading Name (If Applicable):	
Registration Number:	
Vat Number (If applicable)	
Enterprise Physical Address:	
Type of Entity (CC, (Pty) Ltd, Sole Prop etc.):	
Nature of Business:	
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 naturalisation- 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;"
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 underdeveloped areas; (e) Black military veterans who qualify to be called a military veteran in terms of the Military Veterans Act 18 of 2011;"

3. I hereby declare under Oath that:

- The Enterprise is _____% Black Owned using the flow-through principle 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 Female 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 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 Designated Group Owned % Breakdown as per the definition stated above:
    - Black Youth % = _____%
    - Black Disabled % =_____%
    - Black Unemployed % =_____%
    - Black People living in Rural areas % = _____%
    - Black Military Veterans % =_____%

- Based on the Audited Financial Statements/Financial Statements and other information available on the latest financial year-end of _____ (DD/MM/YYYY), the annual Total Revenue was R10,000,000.00 (Ten Million Rands) or less
- Please Confirm on the below table the B-BBEE Level Contributor, **by ticking the applicable box.**

100% Black Owned	**Level One** (135% B-BBEE procurement recognition level)	
At least 51% Black Owned	**Level Two** (125% B-BBEE procurement recognition level)	
Less than 51% Black Owned	**Level Four** (100% B-BBEE procurement recognition level)	

4. 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.

5. The sworn affidavit will be valid for a period of 12 months from the date signed by commissioner.

Deponent Signature: _____

Date: _____

_____

Commissioner of Oaths
Signature & stamp _____
Date _____

ANNEXURE F

SWORN AFFIDAVIT – B-BBEE QUALIFYING SMALL ENTERPRISE - GENERAL

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 (**Select one**) of the following enterprise and am duly authorised to act on its behalf:

Enterprise Name:	
Trading Name (If Applicable):	
Registration Number:	
Vat Number (If applicable)	
Enterprise Physical Address:	
Type of Entity (CC, (Pty) Ltd, Sole Prop etc.):	
Nature of Business:	
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 naturalisation- 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;"
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 underdeveloped areas; (e) Black military veterans who qualify to be called a military veteran in terms of the Military Veterans Act 18 of 2011;"

3. I hereby declare under Oath that:

- The Enterprise is _____% Black Owned using the flow-through principle 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 Female 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 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 Designated Group Owned % Breakdown as per the definition stated above:
    - Black Youth % = _____%
    - Black Disabled % =_____%
    - Black Unemployed % =_____%
    - Black People living in Rural areas % = _____%
    - Black Military Veterans % =_____%

- Based on the Audited Financial Statements/ Financial Statements and other information available on the latest financial year-end of _____ (DD/MM/YYYY), the annual Total Revenue was between R10,000,000.00 (Ten Million Rands) and R50,000,000.00 (Fifty Million Rands),

6. 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 level)	
At Least 51% black owned	**Level Two** (125% B-BBEE procurement recognition level)	

4. 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.
5. The sworn affidavit will be valid for a period of 12 months from the date signed by commissioner.

Deponent Signature: _____

Date:_____

_____

Commissioner of Oaths
Signature & stamp
Date: