REQUEST FOR QUOTATION (RFQ)

RFQ NO: 132/2026/EWSS/TRAINING/RFQ

APPOINTMENT OF A SERVICE PROVIDER FOR THE PROVISION OF SAGE ENTERPRISE INTELLIGENCE TRAINING FOR 6 CANDIDATES

DESCRIPTION:	Appointment of a service provider for the provision of Sage Enterprise Intelligence Training for 6 candidates
DURATION:	Once-off - to be completed within 3 Months from appointment.
PROPOSED BID PROCESS:	RFQ
DIVISION UNIT:	EWSS
ISSUE DATE:	11 November 2026
CLARIFICATIONS DEADLINE:	16 November 2026 @ 13:00 p.m.
CLOSING DATE:	18 November 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 has implemented the SCM, HCM and Finance modules on Sage 300, with the associated licences, support, and maintenance. TCTA has also implemented the Sage Enterprise Intelligence reporting tool for Sage 300 finance. As part of the digital enablement and reporting of the Sage environment, Sage Enterprise Intelligence (SEI) training is required for the IT Support Team to develop the necessary skills and capabilities required to effectively support reporting and analytics requirements across SCM, Finance, and HCM functions. Bequester is a third-party procurement

management system that is currently integrated with TCTA's Sage 300 environment. The system is used to support and streamline key procurement and Supply Chain Management (SCM) processes, providing a centralised platform for managing procurement activities, supplier information, sourcing processes, and related documentation.

The training should equip the specialists with the knowledge and practical skills required to develop, maintain, interpret, and utilise SEI reports and dashboards relevant to their respective business functions. The organization requires enhanced data visibility and reporting capabilities to support informed, timely, and data-driven business decision-making. This includes the creation and use of dashboards that provide real-time or near-real-time visibility into key business performance indicators, enabling IT specialists to transform transactional ERP data into meaningful and actionable insights for operational and management decision-making. This capability will enable the team to transform raw transactional data into meaningful insights that support financial management, performance analysis, planning, and informed decision-making

SCOPE OF WORK

DETAILED DESCRIPTION OF GOODS/SERVICES

Nr	Functional Requirement Name	Functional Requirement Description
FR01	SEI Admin and End User Training	• Administrative and End-User Sage Enterprise Intelligence Training
FR02	SEI Training – Sage 300 People	• Training on installation and import of templates for Sage 300 People, report development for HCM • The SEI training required should cover reporting on human resources information, including employee-related data and operational HR reporting.
FR03	SEI Training – Sage 300 Finance	• Training on installation and import of templates for Sage 300 Finance, report development for Sage 300 Finance • The SEI training required should cover the development and utilization of financial reports, including General Ledger, expenditure, revenue, budget, and management reporting.
FR04	SEI Training – Bequester	• Training on the creation of data models, templates relevant to Bequester. Creation of views and report development for SCM • The SEI training should cover the development and utilization of procurement reports including

		evaluation report, procurement spend, contracts and other supply chain activity reports.
FR05	Integration Services	• Demonstration and training on SEI integration capabilities with Sage 300 Finance, Sage 300 People and Bequester

COMPANY EXPERIENCE REQUIRED

- 1. **Company Track Record – SEI Training**

The bidder must have successfully provided at least three (3) **Sage Enterprise Intelligence** training or similar Intelligence reports training within the **last 5 (five) years**. Reference letters or Annexure A evidencing of the training provided within this period will be considered for scoring.

The bidder must submit at least three (3) signed reference letters on their clients' letterheads with contactable details pertaining SEI Training, SEI Support completed within the past five (5) years. with the following information:

- **Client name**
- **Training offered (please indicate)**
- **Contract start date (month and year)**
- **Contract end date (month/year)**
- **Contact person**
- **Contact number**
- **Email address.**

Alternatively, the bidder must fully complete and submit **Annexure A**

2. Company Track Record – Configuring SEI Reports

The bidder must have successfully **configured at least three (3) SEI Reports** within the **last ten (10) years**, for Finance, SCM and HCM. Reference letters or Annexure A evidencing work performed within this period will be considered for scoring

PERSONNEL EXPERIENCE REQUIRED

N/A

DELIVERABLES

. The appointed Service Provider shall be required to deliver the following:

Sage Enterprise Intelligence Administrator Training

- Comprehensive training on the administration, configuration, and management of the Sage Enterprise Intelligence environment.

Sage Enterprise Intelligence End-User Training

- Training on the use, navigation, interpretation, and utilization of reports, dashboards, and analytics.

Sage 300 Finance Reporting Training

- Training on the installation and import of templates, report development, and financial reporting using Sage Enterprise Intelligence and Sage 300 Finance.

Sage 300 People Reporting Training

- Training on the installation and import of templates, report development, and Human Capital Management reporting using Sage Enterprise Intelligence and Sage 300 People.

Bequester Reporting Training

- Training on the creation of data models, views, templates, and Supply Chain Management reports using Bequester data which is a SAGE third party SCM system

Practical Knowledge Transfer

- Hands-on training sessions enabling participants to develop, modify, and maintain reports, dashboards, and data models independently.

Training Materials and Documentation

- Provision of training manuals, user guides, reference materials, and any supporting documentation used during the training.

Training Completion Records

- Submission of attendance registers and training completion certificates for all participants.

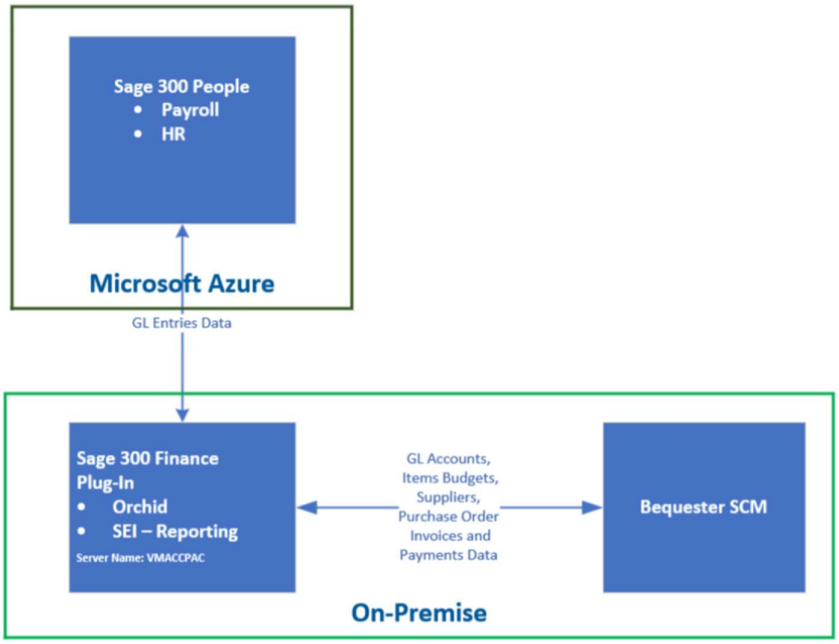
Post-Training Knowledge Transfer Support

- Limited remote assistance for training-related queries for a period agreed upon by both parties following completion of the training. This support shall be limited to clarification of training content and knowledge transfer activities and shall exclude operational support, report development, system administration, or implementation services.

4. CURRENT ENVIRONMENT

- Current TCTA Environment: Microsoft Windows Server environment (Sage 300 Finance & Bequester) and Microsoft Azure - Sage 300 People (Sage MCS)

High-Level Architecture Diagram



5. TECHNICAL REQUIREMENTS:

- API/Integration capabilities between systems: Financial Management, Supply Chain Management and Human Capital Management.

6. TRAINING APPROACH:

- The service provider needs to be able to provide either online or classroom training (Preferably Online training)
- The Service Provider needs to be able to provide training manuals and documentation to the recipients of the training.

7. PRICING MODEL

- Costs for the Training
- Quoted amount is to include all costs and disbursements (including but not limited to travel and other expenses).

8. EVALUATION CRITERIA

TCTA will evaluate the submissions for functional capacity and capability. The evaluation criteria set out in the Table below will be used to evaluate the bidder's functional requirements.
TCTA reserves the right to engage with references or referees provided as part of the technical submission to confirm submitted information during the evaluation process.

RETURNABLES	
MANDATORY	**NON-MANDATORY**
Pricing Model with all-inclusive costs	SCM Bidding Forms: SBD1, SBD 4 & SBD 6.1 must be fully completed and signed.
Bidder's Sage Business Partner accreditation certificate with Sage	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 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**.
Bidder's Sage Enterprise Intelligence certification/accreditation with Nectari	CSD Registration Report
	Evidence of previous SEI training and support delivered with previous clients (client references)

FUNCTIONAL CRITERIA

Criteria A — **20**

Company Track Record – SEI Training

The bidder must have successfully provided at least three (3) **Sage Enterprise Intelligence** training or similar Intelligence reports training within the **last 5 (five) years**.

The bidder must submit at least three (3) signed reference letters on their clients' letterheads with contactable details pertaining SEI Training, SEI Support completed within the past five (5) years. The reference letters must have the following information:

- **Client name**
- **Training offered (please indicate)**
- **Contract start date (month and year)**
- **Contract end date (month/year)**
- **Contact person**
- **Contact number**
- **Email address.**

Alternatively, the bidder must complete and submit Annexure A with at least 3 references demonstrating the training provided within this period.

Scoring Matrix

Years of relevant SEI Training	Score
5 or more training sessions rendered in the last five years.	20
3 to 4 training sessions rendered in the last five years.	15
Less than 3 training sessions rendered in the last five years.	0

Criteria B — **20**

Company Track Record – Configuring SEI Reports

The bidder must have successfully **configured at least three (3) Sage Enterprise Intelligence Reports** within the **last ten (10) years**, for Finance, SCM and HCM. Reference letters or Annexure A evidencing work performed within this period will be considered for scoring.

Scoring matrix:

Years of relevant experience in Configuring Sage Enterprise Intelligence Reports	Score
7 or more SEI projects in the last ten years.	20
4 to 6 SEI projects in the last ten years.	15
3 SEI projects in the last ten years.	10
Less than 3 SEI projects in the last ten years.	0

Total	40

Bidders must obtain a minimum of 25 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	COMPANY TRACK RECORD
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 A SERVICE PROVIDER FOR THE PROVISION OF SAGE ENTERPRISE INTELLIGENCE TRAINING FOR 6 CANDIDATES

NB:

Bidders must submit a price quotation on their Company's Letterhead covering the scope of work and deliverables mentioned above.

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.

Price must be reflected Excluding and Including VAT.

All prices must include disbursements.

Prices must be firm and unconditional. Bids with conditional prices will not be acceptable and will be treated as such

ANNEXURE A – COMPANY TRACK RECORD

		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:	**132/2026/EWSS/TRAINING/RFQ**	CLOSING DATE:	**18 November 2026**	CLOSING TIME:	**11:00 A.M.**
DESCRIPTION	**APPOINTMENT OF A SERVICE PROVIDER FOR THE PROVISION OF SAGE ENTERPRISE INTELLIGENCE TRAINING FOR 6 CANDIDATES**				

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**

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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

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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 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