

KZN GROWTH FUND AGENCY
REQUEST FOR QUOTATION (RFQ)
APPOINTMENT OF EMPLOYEE WELLNESS AND HEALTH PROGRAMME
SERVICE PROVIDER FOR A PERIOD OF 36 MONTHS
RFQ REFERENCE NUMBER - KZNGFA- RFQ 2026 - 13

Closing date : **22 October 2026**
Time : 12:00
Submission format : Email scm@kzngf.co.za

Name of the respondent:

Late bids will not be accepted

BID DETAILS

Bid title : Appointment of employee wellness and health programme service provider for a period of 36 months

Procurement Reference Number: : KZNGFA- RFQ 2026 - 13

Description of Goods & Services : Employee Wellness and Health Programme

Date of RFQ : 09 October 2026

Date of RFQ Closing : **22 October 2026**

CONTACT INFORMATION

Any enquiries regarding the bidding procedure may be directed to:

Procurement Officer: Sijabulile Ntshangase

Telephone: 031 372 3720

E-mail: scm@kzngf.co.za

BIDDER'S DETAILS

NAME OF BIDDER.....

POSTAL ADDRESS

STREET ADDRESS

CONTACT PERSON

TELEPHONE NUMBER Code Number

CELL PHONE NUMBER Code Number

FACSIMILE NUMBER Code Number

E-MAIL ADDRESS

Signature of Bidder **Date**

1. PURPOSE

The purpose of this request for quotations is to invite suitably qualified and accredited service providers (registered with the Health Professions Council of South Africa) to submit quotations to provide support programmes that promote the Health and Wellness of our employees and their immediate family members. For this purpose, immediate family means spouse, child, and anyone dependent financially and otherwise on the employee at The Kwazulu-Natal Growth Fund Agency (KZNGFA).

2. BACKGROUND

KZN Growth Fund Agency (KZNGFA) is, established and capitalised by the Provincial Government to provide debt and equity. The main objective of the KZNGFA is to provide support for creating and enabling environment for activities that create jobs and accelerate the economic development of KZN whilst promoting Broad Based Black Economic Empowerment (B-BBEE).

2.1 Procurement Philosophy

It is the policy of KZNGFA, when purchasing goods and obtaining services to follow a course of optimum value and efficiency by adopting best purchasing practices in supply chain management, ensuring that open and fair competition has prevailed, with due regard being given to the importance of:

- a) The promotion, development and support of businesses from disadvantaged communities (small, medium, micro enterprises, as well as established businesses within those communities) in terms of its BEE Policy;
- b) The promotion of national and regional local service providers and agents before considering overseas service providers and;
- c) The development, promotion and support for the moral values that underpin the above, in terms of KZNGFA Business Ethics and Guidelines which requires that all commercial conduct be based on ethical and moral values and sound business practice. This value system governs all commercial behaviour within KZNGFA.

The KZNGFA wishes to engage with service providers who are equally committed to maintain high-quality services and better pricing.

2.2 CURRENT ENVIRONMENT:

KZNGFA employees can access the services of a Wellness Programme through a 24/7/365 days' phone line. This can be done through self-referral as well as employer referral. The service covers the employee, and his/her immediate family members. KZNGFA has a staff complement of approximately 45 which also includes the participants of our Internship and Graduate Programme.

2.3 OVERALL OBJECTIVES:

- To increase productivity, heighten morale and teamwork; and strengthen the bonds between management, employees, and the organization by providing a sustainable and confidential employee wellness service to all KZNGFA employees.
- To establish and maintain a holistic approach to support employees in managing their personal and social problems.
- To provide employees and their immediate family members with a comprehensive resource to help them address personal problems.
- To provide management with a practical resource to aid in supporting employees with personal and work-related problems when they impact on an employee's performance.
- To establish and maintain a system through which employees at risk can be identified, motivated, and referred for assistance.
- To develop and improve life skills and promote self-empowerment.
- To promote and encourage employee healthy lifestyles.
- To promote work-life balance and maintain a healthy workforce within a supportive environment.

3. SCOPE OF SERVICES REQUIRED WORK AND DELIVERABLES

The service provider will be required to:

3.1 PROVIDE A COMPREHENSIVE EMPLOYEE WELLNESS AND HEALTH PROGRAMME SHOULD INCLUDE THE FOLLOWING SERVICES:

- Provide confidential professional support services through a 24-hour unlimited access call centre for psychological and social wellbeing related issues for all employees and their immediate family members
- Consultation with, training of, and assistance to managers and supervisors, seeking to manage the negative effect of stress on employees, to enhance the work environment, and improve work performance.
- Outreach to and education of employees and their family members about the availability of Employee Wellness and Health Programme services.
- Confidential, appropriate, and timely problem identification and assessment
- services for employees' personal concerns that may affect work performance.
- Use of constructive confrontation, motivation and short-term intervention with employee clients to address problems that affect job performance.
- Appropriate referrals of employee clients for diagnosis, treatment, and assistance, case monitoring and follow-up services.
- Formation of linkages between the work site Employee Wellness and Health Programme, community resources, and individual practitioners who provide Employee Wellness and Health Programme related services.

- To encourage availability of and employee access to health benefits covering drug dependency, mental disorders, and emotional problems.
- Follow-up services for employees who utilise the Employee Wellness and Health Programme.
- **Provide KZNGFA with monthly information aligned to the annual National Health Calendar.**

Areas of Assistance and Intervention:

To provide assistance with a broad range of personal concerns, including, but not limited to:

- Marital, family, relationship and domestic violence problems.
- Substance abuse and addiction (alcohol, drugs, prescription medication) and other addictive behaviour (e.g. gambling, smoking).
- Medical and health problems (HIV & AIDS, cancer, etc.).
- Workplace violence, accidents and trauma.
- Workplace discrimination or victimisation.
- Personal debt and financial management problems.
- Stress (family, social, work).
- Legal matters
- Provide quarterly reports on the service utilisation and employee evaluation of the services
- Market and promote the employee wellness and health services
- Collaborate with HR to organise and partake in the annual KZNGFA Wellness Day
- Provide services aligned with the National Health Calendar
- Treat all information confidential; this applies to the information acquired before, during and after completion of the contracted period.
- Review current employee wellness framework and identify improvement/ enhancement areas.
- Develop proposals for an integrated plan for the organization including the implementation of Employee Wellness and Health Programme support and counselling services, wellness awareness programme, Executive Wellness programme, and other relevant interventions and initiatives.
- Assist in the development of a comprehensive work-related programme that links to the relevant Employee Wellness and Health Programme issues.
- The plan should also include wellness related life skills training programme for staff and support programmes for management e.g., anti-stress programmes, financial management skills etc.
- HIV/AIDS Counselling programme in which includes prevention interventions, treatment care and support.
- Debriefing sessions (Trauma, death in the workplace, etc.)
- General counselling (Personal Trauma, death in the family, etc.)
- Referral system for childcare or elder care.
- Legal advice.
- Wellness Program and health promotion, nutritional education and fitness awareness.
- Advice to managers and supervisors dealing with difficult situations.

3.2 SUBMIT A METHODOLOGY/IMPLEMENTATION PLAN INCLUDING:

- How the service will be provided to our employees e.g., Toll free number, referral network, availability 24/7/365.
- Availability of staff members on a typical business day and after hours.
- When and how the referral system will work.
- How often the referral network is updated and how easy is it to access.
- Policy on returning calls e.g., 24 hours.
- Language Policy.
- Confidentiality Policy.

3.3 EXPECTED OUTCOME AND DELIVERABLES OF THIS PROJECT

- Provide Employee Wellness and Health Programme services as per the scope for approximately 45 to 50 employees, 24/7/365.
- The ability to provide **monthly and quarterly reports** and stats on employee usage, areas of usage or areas of services used, areas of concern and able to provide recommendations, including using graphs and dashboards on reports.
- The ability to provide education and awareness material for health promotions.
- Include a fee structure – Flat fee rate based on number of employees.
- Ability to start on the date agreed with the Client during contract negotiations.
- Advise managers and supervisors on handling difficult situations.
- Brief and train managers and employees on how to access the Employee Wellness and Health Programme services.

3.4 MANAGEMENT

Management requirements for this contract include:

- The service provider will submit monthly utilization reports to KZNGFA's representative.
- The manager referring the employee will receive progress reports regarding the employee on the programme.
- Training for managers on the referral process

4. CONTRACT DURATION

The contract shall be a 36-months contract effective from the date agreed during contract negotiation.

5. AWARD OF THE RFQ

KZNGFA is not obliged to accept and award this tender to the lowest bidder or any other bidder.

6. EVALUATION PROCESS AND CRITERIA

Selection will be conducted over two stages as detailed below:

Stage 1 – Compliance with Minimum Requirements

Stage 2 – Functionality Evaluation

Stage 3 – Price and Specific Goals

6.1 STAGE 1 – COMPLIANCE WITH MANDATORY AND NON-MANDATORY REQUIREMENTS

NON-MANDATORY REQUIREMENTS

- 6.1.1 Evidence of registration on the National Treasury Central Supplier Database (MAAA) and a Compliant Tax Status (SARS Pin must be submitted if Tax Status is non-compliant).

COMPLIANCE WITH MANDATORY REQUIREMENTS

- 6.1.2 Signed and fully completed RFQ document (page 2)
- 6.1.3 Signed and completed SBD 1, SBD 4, and SBD 6 including (MAAA)
- 6.1.4 Company Profile that clearly details experience in employee wellness and health program.

All bids duly lodged as specified in this RFQ will be examined to determine compliance with the mandatory requirements and conditions.

Failure to provide any mandatory information as requested above will result in the submission being deemed non-responsive.

6.2 STAGE 2 – FUNCTIONALITY

Responses will be evaluated on the following basis:

The evaluation criteria and weights for functionality are reflected in the table below: -

FUNCTIONAL EVALUATION CRITERIA	Weight
REFERENCE LETTERS Letters of reference from other clients relevant to Employee Wellness and Health Programme. 3 Letters of Reference relevant to the scope of work = 15 points 2 Letters of Reference relevant to the scope of work = 10 points 1 Letter of Reference relevant to the scope of work = 5 points Letters must be on company letterhead, signed and dated not older than must 5 years.	15
TEAMS EXPERIENCE CVs of at least two (2) qualified wellness practitioners (Psychologists/ Councilors) and also proof that they are registered with Health Professions Council of South Africa (HPCSA) or South African Council for Social Service Professions (SACSSP) Wellness Practitioner x 2 (10 points per practitioner) Attached proof of HPCSA or SACSSP Certificate = 5 points Minimum 5 years relevant experience = 5 points Less than 5 years relevant experience = 3 points Failure to attach proof of qualifications will result in a score of zero. Failure to submit a one-page CV using Annexure B will result in a score of zero.	20
Methodology and Approach Bidder must provide a detailed methodology and approach that will cover all the below - The bidder must provide a clear, detailed, and defined methodology how the project will be executed: - Project plan outlining activities, milestone, and timelines: - Provide approach and project management plan from the start to the finalisation stage: - Methodology and approach outline all three of the elements = 15 - Methodology and approach outline two of the elements = 10 - Methodology and approach outline only one of the elements = 5 - Methodology does not speak to any of the elements = 0	15
TOTAL	50

6.3 STAGE 2 – PRICE AND SPECIFIC GOALS

6.3.1 Proposals will be subject to an evaluation based on an 80/20 – 80 points for price and 20 points for specific goals.

6.3.2 Fixed price is required; price must be inclusive of VAT and all costs relating to disbursements and accommodation. See **Annexure A**

Evaluation	Maximum points to be awarded
Relative competitiveness of the price	80
Specific Goals (see the below table)	20
Total Price and B-BBEE Points	100

SPECIFIC GOALS TABLE

SPECIFIC GOAL		POINTS
Black Ownership	51% - 100 %	10
	30% - 50%	6
	5% - 29%	4
	0% - 4%	0
Black Women Ownership	51% - 100 %	4
	30% - 50%	2
	5% - 29%	1
	0% - 4%	0
Black Youth Ownership	30% - 100 %	3
	5% - 29%	2
	0% - 4%	0
Disability	30% - 100 %	3
	5% - 29%	2
	0% - 4%	0
TOTAL POINTS		20

The following may be used as proof for claiming preference points:

- BBEE Certificate or BBEE Affidavit
- CSD Report
- ID Documents of the owners of the company
- Doctors Certificate / disability database from relevant institutions (for more research)

7. THE INFORMATION REQUIRED

You are required to provide the KZNGFA with a proposal, by **no later than 12:00 on 22 October 2026**.

8. SUBMISSION DETAILS

- Submissions and queries must be emailed to scm@kzngf.co.za attention **Precious Mbambo** by no later than the stipulated time above.

Approved by



B Khuzwayo 2026-10-09 (Electronic)

Bonga Khuzwayo
Human Resource Manager

NAME OF BIDDER: _____

OFFER TO BE VALID FOR 90 WORKING DAYS FROM THE CLOSING DATE OF RFQ.

Number	Description	Quantity	Unit Price	Total Price
1.	Monthly Management of Employee Wellness and Health Programme.	Year 1		
2.	Monthly Management of Employee Wellness and Health Programme. (Include escalation amount if applicable)	Year 2		
3.	Monthly Management of Employee Wellness and Health Programme. (Include escalation amount if applicable)	Year 3		
4.	Provide monthly and quarterly reports and stats on employee usage, areas of usage or areas of services used, areas of concern and able to provide recommendations, including using graphs and dashboards on reports.			
Sub-total				
VAT@ 15%				
Grand Total				

Tenderers signature.....

COMPANY STAMP



Curriculum Vitae

1. Role

Name and Surname	
Current Job Title	
Project Role for KZNGFA (e.g. Technical Resource)	

2. Relevant Qualifications/Certifications

Qualification	Institution	Year Obtained	Expiry Date (if any)

3. Relevant Experience

Company Name	Position	Key responsibility	Start Date	End Date

4. References

Name	Company Name	Position	Relationship

PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)					
BID NUMBER:	KZNGFA- RFQ 2026 - 13	CLOSING DATE:	22 October 2026	CLOSING TIME:	12:00PM
DESCRIPTION	Appointment of Employee Wellness and Health Programme service provider for a period of 36 months				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
Via email to scm@kzngf.co.za					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Sijabulile Ntshangase		CONTACT PERSON	Precious Mbambo	
TELEPHONE NUMBER			TELEPHONE NUMBER		
FACSIMILE NUMBER			FACSIMILE NUMBER		
E-MAIL ADDRESS	scm@kzngf.co.za		E-MAIL ADDRESS	scm@kzngf.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
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] ☐ Yes ☐ No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		TICK APPLICABLE BOX] ☐ Yes ☐ No
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]					
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	☐ Yes ☐ No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS 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

1. 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, 2022, 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).
2. 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 institution	State

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

2.2.1 If so, furnish particulars:

.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

2.3.1 If so, furnish particulars:

.....

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

3 DECLARATION

I, the undersigned, (name)..... in submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

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

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

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

(delete whichever is not applicable for this tender).

- a) ~~The applicable preference point system for this tender is the 90/10 preference point system.~~
- b) The applicable preference point system for this tender is the 80/20 preference point system.
- c) ~~Either the 90/10 or 80/20 preference point system will be applicable in this tender. The lowest/highest acceptable tender will be used to determine the accurate system once tenders are received.~~

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price; and
- (b) Specific Goals.

1.4 **To be completed by the organ of state:**

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	100

1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or

any other method envisaged in legislation;

- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

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

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

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

3.2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

3.2.1. POINTS AWARDED FOR PRICE

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

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

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmax = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
 - (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,
- then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

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

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

Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)

The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Black Ownership		10		
Black Women Ownership		4		
Black Youth Ownership		3		
Disability		3		

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 because 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:

.....

.....

.....