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Council for Geoscience

REQUEST FOR QUOTATION FOR GOODS AND SERVICES

Council for Geoscience requests your quotation on the goods or services listed hereunder.
 Please furnish all information as requested and return your quotation on the date stipulated.
Late quotations will not be considered.

THIS REQUEST WILL BE EVALUATED BASED ON AN 80/20 (PRICE AND SPECIFIC GOAL/S) PREFERENCE SYSTEM

NB: Bidders must provide their quotes with the latest completed SBD6.1 (PPR 2022) form. To claim points on specific goal/s (as stipulated in SBD6.1), a Certified BBBEE Certificate /affidavit must be provided as a supporting document.

In a case where a bidder does not provide the certified supporting document/s or incorrect completion of the SBD6.1, they will not be awarded points.

Date Request Sent	25 November 2025
Department	Supply Chain Management
Description of goods and services	Appointment of a service provider or individual consultant to conduct a review of the Council for Geoscience Pension and Provident Funds structure, overall performance and make recommendations for optimisation whilst ensuring compliance with relevant legislation
Detailed description	<p>Specification Document for Requesting qualified service providers to conduct a comprehensive assessment and strategic review of Pension and Provident Funds.</p> <p>1. Introduction</p> <p>The Council for Geoscience (CGS) has a Provident Fund and a Pension Fund and would like to conduct a strategic review on how these funds are structured and to evaluate the structural integrity, investment performance, and sustainability of the Pension and Provident Funds.</p> <p>2. Project Objective</p> <p>The primary objective of this assignment is to review the structure of the said funds; review, track and report on the fund performances; and to provide recommendations on alternatives of how the funds could be restructured to optimise benefits and improved sustainability for members and to provide strategic recommendations long-term sustainability of the Funds.</p> <p>3. Required Skilled Resources</p> <p>CGS seeks three skilled resources with the following expertise:</p> <p>A. Resources</p> <ol style="list-style-type: none"> 1. Actuarial Expertise 2. Fund Administration

	<ol style="list-style-type: none"> 3. Principal Officer Expertise 4. Demonstrated experience in fund restructuring, investment analysis, and governance advisory 5. Strong understanding of relevant legal and regulatory frameworks <p>4. Scope of Work</p> <ul style="list-style-type: none"> • Conduct a diagnostic review of the fund structure of the CGS Pension Fund and Provident Fund • Review, track and report on the fund's performances • Evaluate asset allocation, investment strategy, risk-adjusted returns • Analyse costs, including administration, management, and advisory fees. • Develop fund restructuring scenarios supported by financial models. • Provide recommendations on alternatives regarding how the funds could be structured to optimise benefits for the members • Review internal controls and audit findings related to the Funds • Conduct market research and benchmarking exercise for similar funds. • Compare fund structure and performance with similar organisations locally and internationally • Conduct interviews or surveys with key stakeholders (management, trustees, employees) • Assess satisfaction levels and alignment with member expectationsProposed Restructuring Scenarios Present findings and strategic recommendations to management of the CGS • Review the current investment policies and governance framework of the funds. • Assess risk management practices, identify gaps, inefficiencies and compliance risks. <p>5. Deliverables</p> <ul style="list-style-type: none"> • Comprehensive reports on the structure of the funds detailing advantages and disadvantages • In consultation with Simeka (current investment consultants), provide a comprehensive report on fund's performances indication gains and opportunity losses, as applicable. • Recommendations report on alternative fund structures and specifically which structure is optimal for the CGS funds. • Benchmarking report detailing how similar funds are structured for consideration • Market research report on possible fund managers and what each one's offerings are. <p>6. Timeline</p> <p>The resources will be engaged for a 3-month period from the inception of the project.</p> <p>7. Evaluation Criteria</p> <p>The selection will be based on the following:</p>
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Mandatory Documentation	Bidders must submit any of the requirements mentioned below for Resource 1 , and failure to comply will lead to disqualification: <ul style="list-style-type: none">Valid Certified Financial Analyst or equivalentValid CA(SA)/CIMA/ACCA or equivalent				
Functional Evaluation criteria	FUNCTIONALITY EVALUATION CRITERIA				
	Deep financial and investment analysis knowledge and a firm technical grasp of structuring of retirement funds and best practices				
	1	Experience – Resource 1 <ul style="list-style-type: none">More than 5 years of experience in financial and investment analysis = 50 pointsMinimum of Five (5) years of experience in financial and investment analysis accounting = 35 pointsLess than Five (5) years of experience in financial investment analysis = 0 points.			50
	2	Company/Individual Consultant Experience: Reference/testimonials letters for provision related services (Letters must be dated and signed). <ul style="list-style-type: none">Two (2) or more reference/testimonials letters =50 pointsOne (1) reference/testimonials letters = 35 pointsNo reference/testimonials letters, no reference/testimonials letters /Irrelevant reference/testimonials letters = 0 points. <p>The references/testimonials can also be submitted in the form of the table below as a substitute for reference letters</p>			50
	The minimum threshold to be met is 70 points and failure to comply will lead to disqualification.			100	
References Table	CLIENT'S NAME	PROJECT DESCRIPTION	CONTACT PERSON	TELEPHONE AND EMAIL ADDRESS	

	Service provider/Individual Consultant must comply with all the mandatory requirement to be considered further on price and specific goals evaluations.														
	<table border="1"> <tr> <th>Resource Resources</th><th>UOM</th><th>Rate VAT</th></tr> <tr> <td>Certified Financial Analyst</td><td>Per hour</td><td>R</td></tr> <tr> <td colspan="2">TOTAL PROFESSIONAL FEES(A)</td><td>R</td></tr> <tr> <td colspan="2">This will be a time and material contract</td><td></td></tr> </table>	Resource Resources	UOM	Rate VAT	Certified Financial Analyst	Per hour	R	TOTAL PROFESSIONAL FEES(A)		R	This will be a time and material contract				
Resource Resources	UOM	Rate VAT													
Certified Financial Analyst	Per hour	R													
TOTAL PROFESSIONAL FEES(A)		R													
This will be a time and material contract															
Enquiry details (this must not be used for submission of quotations)															
Telephone no:	012 841 1509														
Email	nyonke@ geoscience.org.za														
Important: Any quotation submitted outside e-bids email address will not be considered for evaluation.															
Submission of quotation to below details															
Email	E-bids@geoscience.org.za ATT: NCUMISA YONKE														
Quote this information in all correspondences	RFQ10000491NY: Appointment of a service provider or individual consultant to conduct a review of the Council for Geoscience Pension and Provident Funds structure, overall performance and make recommendations for optimisation whilst ensuring compliance with relevant legislation														
Compulsory Briefing Session															
Closing Date and Time	02 December 2025 at 16h:00														

Company Name	
Bidder Signature	
Designation	

RFQ TERMS AND CONDITIONS

1. The rate must be VAT inclusive, for VAT registered vendors only and In an event that non-VAT vendor intentionally or erroneously quoted prices inclusive of VAT, the CGS shall consider total price exclusive of VAT in consultation with the affected service provider(s)
2. The Council for Geoscience pays 30 days after receipt of a correct tax invoice/statement.
3. **Participating in this project does not preclude the appointed service provider from participating in related/similar work in the future.**

- 4. The Council for Geoscience does not make pre-payments or deposits unless contract required by contract terms.**
5. The Council for Geoscience will only pay suppliers using the banking details listed on your Central Database Summary form.
6. Rates must be inclusive of delivery, and customs /clearing costs to the Council for Geoscience premises.
- 7. The rates must be inclusive of disbursement and any other costs.**
8. RFQ responses must be submitted in pdf format.
9. Service providers must provide proof of registration on the National Treasury Central database, if a supplier is not registered; they are encouraged to register on the central database.
10. Quotation validity is 60 days from the date of RFQ closure.
11. The RFQ threshold is less than R1 000 000.00 VAT inclusive.
12. Treatment of arithmetic errors in the quotations
 - a) If the pricing schedule apply and there is an error in the line-item total resulting from the product or services of the unit rate and quantity, the line-item total shall govern, and rate shall be corrected. Where there is obviously gross misplacement of the decimals point in the unit rate, the line-item total as quoted shall govern and the unit rate shall be corrected.
 - b) Where there is an error in the of the prices, either as result of other corrections required by the checking process or in the RFQ's addition of prices, the total of the prices shall govern, and the service provider will be asked to revise selected item prices to achieve the total quoted price.
 - c) No bidder shall be offered competitive advantage to change total quoted prices after closing of the RFQ. If the bidder's change price, they will be disqualified.

13. Conducting business with former employees

- a. The CGS may not conduct business with former employees or companies owned by former employees, within the first twelve (12) months of the termination of their employment service. The CGS may investigate special circumstances where the need to conduct business with former employees has arisen before the expiry of the 12-month period, and after consideration of the merits of the bid, may decide to award such a bid.
- b. A decision approving to conduct business with former employees or companies owned by former employees must be made on the basis, amongst others, that such former employees of the CGS or their companies will not result in any unfairness to other bidders in any procurement process of the CGS.
- c. Whether to consider the bid of former employees or companies owned by former employees may not be considered, if the former employees under consideration previously engaged in any fraudulent, dishonest or unethical conduct whilst employed by the CGS.
- d. CGS may, on justifiable grounds and after following due process, disregard the submission of any Bidder /Tenderer if that Bidder / Tenderer or any of its directors, members or trustees or partners has –
 - Abused the CGS's supply chain management system
 - Committed fraud or any other improper conduct in relation to such system; or
 - Failed to perform on any previous contract
- e. Requirements and evaluation of joint venture or consortium quotations/proposals
 - The JV agreement for JV partners must be submitted indicating a percentage split up to 100% for partners to render the agreement valid which must include, among other things,

but to limited to role and responsibilities of each JV partner in the contract, JV bank account and power of attorney to sign the bid document on behalf of the JV. etc

- All the JV partners or the lead Partner must submit mandatory documents, where applicable, depending on the nature of the project. Refer to mandatory requirements for this RFQ.
- All the JV partners or unincorporated JV must submit administrative documents i.e CSD, company registration documents etc, refers to administrative requirements of this RFQ.
- Specific goals evaluation for incorporated JV shall be applied considering consolidated BBBEE certificate.
- Specific Goals evaluation for unincorporated JV shall be applied proportionally in accordance with the JV % split.
- Below is a demonstration of points allocation for specific goals where the total points claimed will be the sum of the percentage work allocation for each partner multiplied by the percentage weighting for the race category, multiplied by the percentage ownership in the relevant specific goals.

Example of the formula

goals points	60 %	40 %	RFQ specific
	<div> <u>Company B</u> 80% Women 20% Youth </div>	<div> <u>Company B</u> 30% Women 50% Youth </div>	<div> 30% Women owned company= 10 20% youth owned company = 10 </div>
	Score for Women: $60\% \times 80\% \times 10 = 4.8$ points Score for Youth: $60\% \times 20\% \times 10 = 1.2$ points Total = 6 points	$40\% \times 30\% \times 10 = 1.2$ points $40\% \times 50\% \times 10 = 2$ points Total = 3.2 point	Total Points for JV = 9.2

14. SUPPLIER PRE-APPOINTMENT VETTING

Service providers may not be appointed or engaged for the provision of goods or services unless a due diligence and vetting process has been completed to the satisfaction of the Council for Geoscience. This process shall include, but is not limited to, verification of the supplier's legal status, financial stability, technical capability, quality assurance standards, compliance with ethical and references from previous clients.

15. INFORMATION CLARIFICATIONS

The Council for Geoscience may request clarification in writing regarding the information provided by bidders. Supplier(s)/ service provider(s) are to provide the required information within the specified period. Failing to respond, will invalidate your bid, therefore lead to disqualifications from the process

16. CGS POPI ACT COMPLIANCE POLICY STATEMENT

The Council for Geoscience is committed to securing the integrity and confidentiality of your Personal Information that is in our possession and will guard against unlawful access and use. The processing of your personal information by the Council for Geoscience will be done in accordance with the POPI Act 4 of 2013 as well as our processing notice that can be accessed from our webs

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**

- 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.

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 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.

- 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

SBD 6.1

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

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

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

1. GENERAL CONDITIONS

- 1.1 The following preference point systems are applicable to invitations to tender:
- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
 - the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 **Preference point system**

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

- a) The 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 **Allocated preference points**

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 PREFERENCE POINT SYSTEMS

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

80/20

$$P_s = 80 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right)$$

Where

P_s = Points scored for price of tender under consideration

P_t = Price of tender under consideration

P_{min} = Price of lowest 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.

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

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

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
1. 51% or more black Ownership. (Submit a valid certified Accredited SANAS or DTI B-BBEE certificate or sworn affidavit as supporting document)	10	
2. 30% or more black women ownership (Submit a valid certified Accredited SANAS or DTI B-BBEE certificate or sworn affidavit as supporting document)	10	

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:

CG:

date: 31/05/2023

