



RFP NUMBER:	RFP/SASSETA/24251126/2
DESCRIPTION:	Appointment of a suitably experienced and knowledgeable service provider to implement end-to-end management of the individual bursary process on an ad hoc or full-scale basis on behalf of SASSETA from date of appointment until 31 March 2030
PUBLISH DATE:	22 September 2026
CLOSING DATE:	16 October 2026
CLOSING TIME:	11h00 am
COMPULSORY BRIEFING SESSION DATE	N/A
VALIDITY PERIOD:	120 days from the closing date
PREFERENCE POINT SYSTEM	80/20
BID RESPONSES TO BE SUBMITTED ELECTRONICALLY:	Proposals are to be submitted electronically via email to bursaries1@sassetta.org.za for the attention of Ms. Lebo Hlombe, Quoting the reference (RFP/SASSETA/24251126/2)
ATTENTION:	Ms. Lebo Hlombe
The email address (bursaries1@sassetta.org.za) is for the submission of tender proposals only and will be accessed by SASSETA after the tender closing date and time.	
Queries related to this tender are to be sent to scm01@sassetta.org.za .	

NB: The SASSETA logo and other intellectual property rights are owned by SASSETA and are protected by applicable intellectual property laws. Unless authorized in writing, you are prohibited from using the SASSETA logo or any of its intellectual property in any manner whatsoever. Any unauthorized use of the SASSETA Logo may result in legal action.

If you receive any suspicious calls asking for payment to secure an award of a bid or that the outcome of a tender can be influenced in your favour, please immediately inform the SASSETA Anti-Corruption Hotline at 0800 162 111 for further investigation.

DOCUMENTS IN THIS BID DOCUMENT PACK

Bidders are to ensure that they have received all pages of this document, which consist of the following documents:

SECTION A

1. RFP Submission Conditions and Instructions
2. Terms of Reference
3. Selection Process

SECTION B

1. Invitation to Quote (SBD 1)
2. Pricing Schedule (SBD 3.3)
3. Bidder's Disclosure (SBD 4)
4. Preference Points Claim form in terms of Preferential Procurement Regulations 2022 (SBD 6.1).
5. Submission Checklist
6. General Conditions of Contract (Annexure A)
7. Pricing Schedule (Annexure B)
8. CV Template (Annexure C)

1. RFP SUBMISSION CONDITIONS AND INSTRUCTIONS

1.1 FRAUD AND CORRUPTION

- 1.1.1 All Service Providers are to take note of the implications of contravening the Prevention and Combating of Corrupt Activities Act, Act No 12 of 2004 and any other Act applicable.

1.2 COMPULSORY BRIEFING SESSION

- 1.2.1 There will be no briefing session for this Request for Proposal

1.3 CLARIFICATIONS/QUERIES

- 1.3.1 Any clarification required by a bidder regarding the meaning or interpretation of the Terms of Reference, or any other aspect concerning the bid, is to be requested in writing (e-mail) from **Ms. Lebo Hlombe** at scm01@sasseta.org.za by **12h00** on **9 October 2026**. The **bid number** should be mentioned in all correspondence. **Telephonic requests for clarification will not be accepted.**

1.4 SUBMITTING BIDS

- 1.4.1 Proposals to be submitted electronically via email to **bursaries1@sasseta.org.za (maximum size of the email 30 MB)**
- Bidders are advised to compress their submission(s) to a maximum of 30MB file/folder. **Any submission(s) exceeding 30MB will be automatically rejected by the server.**
 - Submission(s) can be made through email and WeTransfer. **Bidders are advised NOT to set an expiry date on the submission(s) made.** If a Bidder's response is found to have expired during the evaluation period, it will be considered non-responsive. Bidders who chose to submit via WeTransfer are encouraged to ensure that they have a license for the platform as without it, the submission will automatically expire within seven (7) days.
 - Bidders must not submit their responses via **Google Drive or any other method that will compel SASSETA to request access and/or create an email address out of SASSETA's domain (sasseta.org.za).** Such responses will be considered non-responsive.
 - Bidders are advised to double check their submission(s) before responding to the bid.

❖ Closing date and time: **16 October 2026 @ 11h00**

1.5 LATE BIDS

- 1.5.1 Bids received late shall not be considered. A bid will be considered late if it arrived only one second after 11h00 or any time thereafter. Bids arriving late will not be considered under any circumstances. Bidders are therefore strongly advised to ensure that bids be sent allowing enough time for any unforeseen events that may delay the delivery of the bid.

1.6 NEGOTIATION

- 1.6.1 SASSETA has the right to enter into negotiation with a prospective service provider regarding any terms and conditions, including price(s), of a proposed contract.

1.7 REASONS FOR REJECTION

- 1.7.1 SASSETA shall reject a bid for the award of a contract if the recommended bidder has committed a proven corrupt or fraudulent act in competing for the particular contract.
- 1.7.2 SASSETA shall disregard the bid of any bidder if that bidder, or any of its directors:
 - 1.7.2.1 have abused the Supply Chain Management systems of SASSETA.
 - 1.7.2.2 have committed proven fraud or any other improper conduct in relation to such systems.
 - 1.7.2.3 have failed to perform on any contract and the proof exists.
- 1.7.3 Such actions shall be communicated to the National Treasury.

2. TERMS OF REFERENCE

2.1. INTRODUCTION AND BACKGROUND

- 2.1.1. SASSETA is one of the twenty-one (21) Sector Education and Training Authorities (SETAs) established in terms of the Skills Development Act (Act 97 of 1998) as amended. SASSETA's licence has been renewed until 31st March 2030. SASSETA is classified as a schedule 3A Public Entity in terms of Public Finance Management Act, (Act 1 of 1999, as amended). SASSETA reports to the Department of Higher Education and Training (DHET).

2.2. PURPOSE

- 2.2.1. SASSETA seeks to appoint a suitably experienced and knowledgeable service provider to implement end-to-end management of the individual bursary process on an ad hoc or full-scale basis on behalf of SASSETA. The contract will commence on the appointment date and run until 31 March 2030 with an option to extend up to a maximum of five (5) years.
- 2.2.2. The service provider will be required to manage the implementation of bursaries in all public and private institutions of higher learning across the country in line with the SASSETA Bursary legislative framework.
- 2.2.3. The service provider may administer new applications as well as take over the existing beneficiaries contracted with in prior years.

2.3. SCOPE OF WORK AND DELIVERABLES

- 2.3.1. The service provider will be required to demonstrate an in-depth understanding of project management techniques, monitoring and evaluation, quality assurance, training, and reporting requirements by performing the following functions on a full-scale or ad hoc basis:

2.3.1.1. Application and Advertising

- a) Identify from the Annual Performance Plan supported by the approved Sector Skills Plan which qualifications should be prioritized.
- b) Draft an advert in line with the approved Discretionary Grant Policy and applicable Standard Operating Procedure (SOP).

2.3.1.2. Pre-Screening

- a) Perform shortlisting pre-screening activities on an applicable learner management system.
- b) Conduct interviews and assessment on shortlisted candidates where required.

2.3.1.3. Evaluation and due Diligence

- a) Evaluate the application against a set criteria.
- b) Perform all required due diligence procedures in line with the approved SOP.

- c) Perform validation on learner information and learner documents.
- d) Compile a report of recommended learners to respective Committees.

2.3.1.4. Contracting and Induction

- a) Enrolling learners on the learner management system.
- b) Capturing all required contracting documentation in line with the approved SOP.
- c) Prepare award letters.
- d) Facilitate contract signing.
- e) Induct all learner on SASSETA's expectations including relevant timelines for submission of pertinent information.
- f) Communicate feedback to unsuccessful learners.

2.3.1.5. Monitoring and Evaluation

- a) Monitor on performance of the learners by institution.
- b) Evaluate the conditions of accommodation premises occupied by learners.
- c) Identify additional risks and implement mitigating strategies.
- d) Provide wellness and career guidance support to struggling learners.
- e) Maintain all necessary administration documentation on the learner management system.

2.3.1.6. Invoicing and Payment

- a) Ensure timely
 - payment of registration fee
 - Sourcing of learning material including textbooks for learners.
 - payment of first month lodging/accommodation cost and
 - preparation of payment packs of all other supporting services.
- b) Invoice SASSETA for payments made for the above services timeously.

2.3.1.7. Reporting

- a) Report quarterly to SASSETA on the performance of learners in line with the SETMIS requirements.
- b) Report quarterly to SASSETA on key performance metrics including financial disbursement.
- c) Report to SASSETA on ad-hoc basis any information which may be pertinent to key decision-making processes.
- d) Provide to SASSETA all information required to report entered learners and completions.

2.4. MANDATORY REQUIREMENTS

2.4.1. The bidder should:

2.4.1.1. Submit proof of liquidity (i.e., bank statement) or financial assistance letter from a National Credit Regulator (NCR) registered financial institution as follows:

- The bank statement should reflect a closing balance of R10 000 000.00 not older than 21 days from date of closure of the RFP, or
- The financial assistance letter should be for a minimum of R10 000 000.00 and should not be older than 21 working days from the date of closure of the RFP.

NB: Failure to submit any of the above will lead to automatic disqualification. SASSETA reserves the right to confirm the validity or authenticity of external funding prior to appointment.

2.4.1.2. The service provider to ensure compliance with the Protection of Personal Information Act (POPIA) and submit a valid registration certificate with the Information Regulator of South Africa in the name of the bidding company. **Non-submission of a valid registration certificate(s) with the Information Regulator of South Africa will lead to automatic disqualification.**

2.4.1.3. Bidders to submit CV Template (Annexure C) of the Team Leader. **Non-submission of the requested CV Template (Annexure C) of the Team Leader will lead to automatic disqualification.**

2.5. SUBMISSION REQUIREMENTS

2.5.1. The bidding company to submit at a minimum the information mentioned in the phases below:

- 2.5.1.1. Phase 1 – Automatic disqualification criteria (**section 2.4**)
- 2.5.1.2. Phase 2 – Functionality evaluation criteria (**section 3.2.1.2**)
- 2.5.1.3. Phase 3 – Due diligence evaluation criteria (**section 3.2.1.3**)

2.6. TIMEFRAMES FOR DELIVERY OF THE WORK

2.6.1. This contract will be valid from the date of appointment until 31 March 2030 with an option to extend up to a maximum of five (5) years.

2.7. PRICING

- 2.7.1. The service providers are requested to provide an all-inclusive cost of this project assignment on the SBD 3.3
- 2.7.2. The bidder to ensure delivery of the project within the required timeframes stipulated in the terms of reference.
- 2.7.3. Where the contract requires the successful bidder to travel to a venue different from SASSETA, the following travel and disbursement processes will be undertaken:

- Claim travel mileage costs applicable to this contract as per the Department of Transport rates.
- Book only economy-class flights
- Book Group A hire cars, otherwise Group B are to be used following SASSETA's approval
- Utilise cost-effective mode of transport such as Uber/Taxify/Gautrain or shuttle.
- services when traveling to and from the airport.
- Book only Bed and Breakfast, Hotels, or other equivalent accommodations up to a Rand value of R1 400/ per night per person (including dinner, breakfast, and parking).
- Submit all applicable invoices/receipts for the travel undertaken and also, a google map of the trip where travel by private car was undertaken for payment.

2.7.4. All travel to be approved by SASSETA before being Undertaken.

2.8. ACCOUNTABILITY AND REPORTING

2.8.1. The service provider will report directly to the Office of the Chief Financial Officer for the duration of the contract.

2.9. PENALTY FOR NON-PERFORMANCE

2.9.1. SASSETA reserves the right to enforce penalties, withhold payment, or take other remedial action should the appointed service provider fail to meet the agreed service levels, timelines, or deliverables as will be captured in the Service Level Agreement (SLA).

2.9.2. Final project timelines will be agreed upon with the appointed service provider and incorporated into the SLA. Failure to meet these agreed timelines may result in penalties as outlined in the SLA.

2.10. HANDOVER PROCESSES

2.10.1. On the expiry of this contract, the appointed service provider will be required to hand over all access credentials of all portals to SASSETA.

2.11. CONDITIONS OF CONTRACT (GCC) (ANNEXURE A)

2.11.1. Bidders are requested to initial each page of the General Conditions of Contract (GCC) (Annexure A) and submit their response to this Request for Quotations. The GCC will form part of the contract with the successful Bidder.

2.12. INTELLECTUAL PROPERTY

2.12.1. The service provider will be contracting with SASSETA. All products and data of this project, in whatever format raw or analysed, will be confidential information for utilisation by SASSETA. All information and documents, received from SASSETA or stakeholders, is to be kept confidential and may not be used or distributed in any format without the written approval of SASSETA. To this end, the service provider will be required to sign a confidentiality agreement within the Service Level Agreement.

2.13. PROTECTION OF PERSONAL INFORMATION ACT

2.13.1. All Service Providers are to take note of the implications of POPIA act and any other data privacy Act applicable that SASSETA complies to. In compliance to the act, please be advised that the following are applicable to the treatment of vendor information:

2.13.1.1. All requested bid information will be solemnly utilized for the purpose of the bid evaluation processes. The vendor hereby consents the information provided as part of this bid will be utilized for supply chain processes of SASSETA and may be subject to multiple processing to enable the evaluation of this bid.

2.13.1.2. The vendor consents that the information collected will be retained for the duration of the evaluation and archived for records management purposes. The information will be disposed as per the SASSETA records management policies as prescribed by the national archives act. Furthermore, the information owner acknowledges that the information provided will be scanned into digital records which are retained on the SASSETA backup servers and that are replicated to backup media. SASSETA does confirm that the organization adopts industry best practice with regards to the safeguarding of digital records whether locally stored or retained in backup media.

2.13.1.3. SASSETA confirms that all submitted records will be retained in their original form and will not be altered with to preserve the quality and originality of information provided.

2.13.1.4. SASSETA confirms that the Information Officer is duly responsible for vendor information provided and exercises stringent measures to ensure that information is secured and solemnly utilized for the purpose of use. No vendor records will be distributed or utilized for any processes outside the current bid that the information has been requested for.

3. PROPOSED SELECTION CRITERIA

3.1 Compliance requirements

3.1.1 All bids duly lodged will be examined to determine compliance with bidding requirements and conditions.

3.2 Conditions for selection/short listing

3.2.1 All submissions will be evaluated as follows:

3.2.1.1 Phase 1 – Requirements items, Service Providers to:

- Submit their proposal by the closing date and time. **Proposals submitted after the closing date and time will be disqualified from further evaluation.**
- Submit proof of liquidity (i.e., bank statement) or financial assistance letter from a National Credit Regulator (NCR) registered financial institution as follows:
 - The bank statement should reflect a closing balance of R10 000 000.00 not older than 21 days from date of closure of the RFP, or
 - The financial assistance letter should be for a minimum of R10 000 000.00 and should not be older than 21 working days from the date of closure of the RFP.**NB: Failure to submit any of the above will lead to automatic disqualification. SASSETA reserves the right to confirm the validity or authenticity of external funding prior to appointment.**
- ensure compliance with the Protection of Personal Information Act (POPIA) and submit a valid registration certificate with the Information Regulator of South Africa in the name of the bidding company. **Non-submission of a valid registration certificate(s) with the Information Regulator of South Africa will lead to automatic disqualification.**
- Submit CV Template (Annexure C) of the Team Leader. **Non-submission of the requested CV Template (Annexure C) of the Team Leader will lead to automatic disqualification.**
- complete and submit all Standard Bidding Documents (SBD) forms mentioned above on page 2 of this document, namely: SBD1, SBD 3.3, SBD 4, SBD 6.1.
- Bidders to be registered on the National Treasury Central Supplier Database (CSD) by the closing date and time of this request for quotation. Bidders are to provide SASSETA with a copy of their CSD registration report downloaded from the National Treasury CSD Website.
- Initial each page of the General Condition of Contract (Annexure A) and submit with your proposal.

3.2.1.2 Phase 2 – Functionality evaluations

- The proposals of all service providers will be rated on a scale of 0 to 1.
 - 0: Required document/item not submitted/ Unacceptable, does not meet set criteria
 - 1: Acceptable, does meet set criteria, is adequate for the stated element.
 - 2: Exceptional mastery of the requirement should ensure extremely effective performance.

ELEMENT	FUNCTIONALITY EVALUATION		FUNCTIONALITY WEIGHT	TOTAL SCORE
Suitability of the bidder:	Rating out of 2	Evaluation criteria		
- A bidder to submit a minimum of three (3) signed reference letters on a client's letterhead demonstrating experience in managing the implementation of bursaries: - At minimum one (1) of the three (3) letters requested above should be for contracts of R50 000 000 and above each and must have been issued within the previous five (5) financial years. NB: Copies of contracts with clients should be submitted to substantiate the amounts of the reference letters.	0	Non-submission of signed letters or less than three (3) signed letters demonstrating experience in managing the implementation of bursaries or the letters are older than five (5) years from the bid closing date or none of the letters submitted meet the Rand-value threshold.	40%	
	1	A bidder submitted three (3) signed letters demonstrating experience in managing the implementation of bursaries and at least one (1) of the letters is for a contract of R50 000 000 and above each. Each letter is not older than five (5) years from the bid closing date.		
	2	A bidder submitted four (4) or more signed letters demonstrating experience in managing the implementation of bursaries and at least two (2) of the letters are for contracts of R50 000 000 and above each. Each letter is not older than five (5) years from the bid closing date.		
Experience of the team leader:		Evaluation criteria		
- Team leader to demonstrate extensive knowledge and experience in managing the implementation of bursaries and submit the following documents: - At minimum be in possession of NQF level 7 in Project Management qualification. The qualification certificate to be submitted with the proposal.	0	Non-submission of team leader's CV template (Annexure C) or CV template (Annexure C) does not demonstrate the relevant qualification and adequate experience.	40%	
	1	Team leader's NQF level 7 qualification certificate in Project Management submitted, CV template (Annexure C) demonstrates 10 years' experience in project management and three (3) assignments in managing the implementation of bursaries of which one (1) was a contract of R50 000 000 and above		

b. Demonstrate a minimum 10 years' experience in project management. A comprehensive CV template (Annexure C) to be submitted. c. Must have been a team leader on at least three (3) assignments of which one (1) was a contract of R50 000 000 and above. CV template (Annexure C) to elaborate this experience.	2	Team leader's NQF level 7 qualification certificate in Project Management was submitted, CV template (Annexure C) demonstrates 10 years' experience in project management and four (4) or more assignments in managing the implementation of bursaries of which two (2) were contracts of R50 000 000 and above each.		
Bidder's demonstration on project management:	Rating out of	Evaluation criteria		
A bidder to submit a detailed project implementation plan including a Gantt Chart demonstrating an understanding of the seven (7) scope of work and deliverables items as per section 2.3 (2.3.1.1 – 2.3.1.7)	0	Non-submission of a project implementation plan or submission of an irrelevant project implementation plan or submission of a project plan that covers five (5) or less of the considerations listed in the scope of work items as per section 2.3 (2.3.1.1 – 2.3.1.7)	20%	
	1	A bidder submitted a project implementation plan including a Gantt Chart demonstrating an understanding which covers six (6) of the seven (7) considerations listed in the scope of work items as per section 2.3 (2.3.1.1 – 2.3.1.7)		
	2	A bidder submitted a project implementation plan including a Gantt Chart demonstrating an understanding which covers all seven (7) considerations listed in the scope of work items as per section 2.3 (2.3.1.1 – 2.3.1.7)		
TOTAL			100%	

N/B: Bidders must score a minimum of one (1) in each of the elements above. Bidders who score a zero in any of the elements will be disqualified from further evaluation.

Bidders need to obtain 70% on functionality further evaluation. Bidders who do not meet the required functionality threshold will be disqualified from further evaluation.

3.2.1.3 **Phase 3: Due diligence evaluation criteria**

3.2.1.3.1 Bidders who meet the requirements of the functionality evaluation will be evaluated further on the due diligence requirements indicated below:

All proposals will be evaluated on the criteria provided in the table below. The proposals of all service providers will be rated on a scale of 0 to 1:

0: Unacceptable, does not meet set criteria, not adequate for the stated element.

1: Exceptional mastery of the requirement should ensure extremely effective performance.

3.2.1.3.2 For this phase, the shortlisted bidder will need to demonstrate their bursary management system. SASSETA reserves the right to select the client from any of the provided reference letters for due diligence demonstration. However, on agreement with the SASSETA, the shortlisted bidder might be requested to present a demo solution that covers all scope of work areas highlighted in section 2.3 ((2.3.1.1 – 2.3.1.7). General controls, application controls and effective use of a system will be considered.

Bidder's demonstration of the system:	Rating out of 1	Evaluation criteria		
A bidder through the client solution or their demo system to demonstrate their bursary management solution demonstrating an understanding of the seven (7) scope of work and deliverables items as per section 2.3 (2.3.1 to 2.3.8)	0	A bidder could not demonstrate the system. Demonstrated solution does not meet all seven (7) scope of work and deliverables items as per section 2.3 ((2.3.1.1 – 2.3.1.7)	100%	
	1	A bidder through the client solution or their demo system demonstrated their bursary management solution demonstrating an understanding of the seven (7) scope of work and deliverables items as per section 2.3 ((2.3.1.1 – 2.3.1.7)		
TOTAL			100%	

Bidders need to obtain 1000% on functionality further evaluation. Bidders who do not meet the required functionality threshold will be disqualified from further evaluation.

3.2.1.4 Phase 3 – Price and Specific Goals

- The value of this bid is estimated not to exceed R50 000 000 (all applicable taxes included) and therefore the 80/20 system shall be applicable where 80 points will be allocated to price and 20 points for Specific Goals as follows:

Evaluation Criterion on Price and Specific Goals	
Relative competitiveness of proposed price	80
Specific Goals	20
TOTAL FOR PRICE AND SPECIFIC GOALS	100

3.2.1.5 ADJUDICATION OF BID

- The Bid Adjudication Committee will consider the recommendations of the Bid Evaluation Committee (BEC) and make a recommendation to the Award Authority to make the final award. The successful bidder will usually be the service provider scoring the highest number of points lower-scoring bid based on firm, verifiable and justifiable grounds, or no award at all.

PART A - INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR THE REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)					
BID NUMBER:	RFP/SASSETA/24251126/1		CLOSING DATE:	16 October 2026	
			CLOSING TIME:	11h00am	
DESCRIPTION	Appointment of a suitably experienced and knowledgeable service provider to implement end-to-end management of the individual bursary process on an ad hoc or full-scale basis on behalf of SASSETA from date of appointment until 31 March 2030				
PROPOSALS TO BE EMAILED:					
Proposals to be submitted electronically via email to bursaries1@sassetta.org.za for the attention of Ms. Lebo Hlombe					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Ms. Lebo Hlombe		CONTACT PERSON	Ms. Lebo Hlombe	
E-MAIL ADDRESS	scm01@sassetta.org.za		E-MAIL ADDRESS	scm01@sassetta.org.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 PART B:3]
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 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.

NAME OF SIGNATORY

SIGNATURE OF BIDDER:

N/B.: If a Company has one director as listed on CSD, the one Director to sign these documents on behalf of the Company. Any other member of the Company will require a Company Resolution to be attached to this submission signed by the duly Authorised Director.

N/B.: If the Company has more than one Director as listed on CSD, a signed Company Resolution to be attached to confirm that the one Director can sign on behalf of the Company. Any other member of the Company will require a Company Resolution to be attached to this submission signed by the duly Authorised Directors.

CAPACITY UNDER WHICH THIS BID IS SIGNED:
(Proof of authority must be submitted e.g. company resolution)

DATE:

PRICING SCHEDULE**(Professional Services)**

NAME OF BIDDER:

BID NO.: **RFP/SASSETA/24251126/1**CLOSING TIME: **11h00**CLOSING DATE: **16 October 2026**OFFER TO BE VALID FOR **120** DAYS FROM THE CLOSING DATE OF BID

ITEM NO	DESCRIPTION	BID PRICE IN RSA CURRENCY **(ALL APPLICABLE TAXES INCLUDED)
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1. The accompanying information must be used for the formulation of proposals, and each price below **must be inclusive of VAT (where applicable)**:

- i. Bidders are to submit Annexure B. **Non-submission of Annexure B will lead to automatic disqualification.**
- ii. Bidders are to ensure that all items indicated on (Annexure B) are quoted for. Incomplete Annexure B will lead to automatic disqualification.
- iii. The template will sum up the total.
- iv. Bidders are requested to input their costs only and sign off.
- v. Bidders are requested to submit Annexure B without changing any of the details on this document. Altered Annexure B will lead to automatic disqualification.
- vi. Bidders are required to submit this excel spreadsheet in Excel format for evaluation purposes and also a signed PDF version for audit trail purposes.

Note 1: Total cost including delivery cost as specified in **Annexure B** will be considered for evaluation purposes.

Note 2: Unit price refers to unit descriptions as per **Annexure B**.

Note 3: Prices will escalate with CPIX on the anniversary of the contract

Bidders are to record the name and surname of the proposed Team Leader on this assignment in the table below and ensure that a comprehensive CV of the member is attached to the proposal as follows:

NO.	NAME AND SURNAME (only one name to be recorded)	IS TH CV TEMPLATE ATTACHED (Circle the response below)
1.		Yes/No

NB: The successful service provider will be reimbursed for travel and accommodation disbursements at government rates.

.....

Signature

.....

Date

.....

Position

.....

Name of bidder

(To be signed by a duly authorised Delegate. A signed Company Resolution must be submitted). (To be signed by a duly Authorised Delegate)

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

- 1.1 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, 1996 (Constitution), and further expressed in the various applicable legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.
- 1.2 If a person is 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. DECLARATION ON EMPLOYMENT BY ORGAN OF STATE

- 2.1 Is the bidder, or any of the directors / trustees / shareholders / members / partners of the bidder employed by an organ of state, as defined in section 239 of the Constitution?

YES/NO

- 2.2 If YES, furnish particulars of the names, individual identity numbers, in the table below:

Full Name	Identity Number	Name of organ of state

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

- 2.3.1 If so, furnish particulars:

.....

.....

.....

2.4 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**

2.4.1 If so, indicate all companies registered in the CSD in the table below:

Supplier registration number (MAAA)	Status (active/inactive/deleted)

Failure to disclose all CSD-registered active companies linked to all Directors will lead to disqualification.

3. GENERAL DECLARATION

I,, the undersigned, 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 understand the contents of this disclosure.

3.2 I understand that the accompanying bid will be disqualified if this disclosure is found to be false.

3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor.

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.

3.5 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.

3.6 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.

3.7 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, 1998 (Act No. 89 of 1998) and or may be referred to law enforcement agencies for criminal investigation and or may be restricted from conducting business with the state for a period not exceeding 10 years in terms of the Prevention and Combating of Corrupt Activities Act, 2004 (Act No. 12 of 2004) or any other applicable legislation.

I CERTIFY THAT THE ABOVE IS CORRECT.

I ACCEPT THAT THE PROCURING INSTITUTION MAY REJECT THE BID OR TAKE APPROPRIATE ACTION AGAINST ME IF THIS DECLARATION IS FALSE.

.....
Signature

.....
Date

.....
Designation

.....
Name of bidder

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

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

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

1. GENERAL CONDITIONS

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

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

1.2 To be completed by the organ of state

- (a) (The applicable preference point system for this tender is the 80/20 preference point system.
- (b) The lowest 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:

- (c) Price; and
- (d) 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. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

2.1 POINTS AWARDED FOR THE PRICE

2.1.1 THE 80/20 PREFERENCE POINT SYSTEMS

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

80/20

$$Ps = 80 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

2.2 POINTS AWARDED FOR SPECIFIC GOALS

2.2.1 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.

2.2.2 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:

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 bid	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 bidder)
At least 100% Black People ownership	5	
At least 30% Black Women Ownership	4	
At least 30% Black youth ownership	4	
The Promotion of South African owned enterprises	7	
Total Points	20	

3. DECLARATION WITH REGARD TO COMPANY/FIRM

3.1. Name of company/firm.....

3.2. Company registration number:

3.3. TYPE OF COMPANY/ FIRM

- Y Partnership/Joint Venture / Consortium
 - Y One-person business/sole propriety
 - Y Close corporation
 - Y Public Company
 - Y Personal Liability Company
 - Y (Pty) Limited
 - Y Non-Profit Company
 - Y State Owned Company
- [TICK APPLICABLE BOX]

3.4. 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:	
	
	
	

DOCUMENTS REQUIRED FOR CLAIMING SPECIFIC GOALS

As per bullet 1.6 and 1.7 of the Preference Points Claim Form in terms of the Preferential Procurement Regulations 2022, bidders are required to submit the SASSETA verification document(s) in order to be allocated the specific goals claimed:

- a) An Original/Certified copy of a valid B-BBEE Certificate or Sworn Affidavit.
- b) Valid Companies and Intellectual Property Commission (CIPC) Company registration documents
- c) Certified copy/ies of Identity documents of the Company Directors
- d) CSD report

NB.: Non-submission of the documents required above will lead to specific goal points NOT being awarded.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

(To be signed by a duly Authorised Delegate. A signed Company Resolution must be submitted).

If you receive any suspicious calls asking for payment to secure an award of a bid or that the outcome of a tender can be influenced in your favour, please immediately inform the SASSETA Anti-Corruption Hotline at 0800 162 111 for further investigation.

BIDDERS ARE ENCOURAGED TO USE THE FOLLOWING CHECKLIST WHEN SUBMITTING THEIR BIDS:

NO.	DETAILS	TICK BY BIDDER
1.	Part 1: Completed and signed the invitation to bid document (SBD 1) • To be signed by a duly Authorised Delegate.	
2.	Part 2: Completed and signed pricing schedule (SBD 3.3) • To be signed by a duly Authorised Delegate	
3.	Part 3: Completed and signed the bidder's declaration (SBD 4). <i>(In case of a consortium/ joint venture, or where sub-Service providers are utilised, each party to the bid to complete and sign the declaration of interest document)</i> • To be signed by a duly Authorised Delegate	
4.	Part 4: Completed and signed the Preference Points Claim form in terms of the Preferential Procurement Regulations 2022 (SBD 6.1) To be signed by a duly Authorised Delegate.	
5.	Part 5: Submitted the General Conditions of Contract (initialled each page)	
6.	Part 6: Bidders to submit their National Treasury Central Supplier Database (CSD) registration document.	
7.	Part 7: Bidder's attached quotation on the Company letterhead inclusive of VAT and any other applicable costs in line with the SBD 3.3	
8.	Part 8: The Bidding company to submit proof of liquidity (i.e., bank statement) or financial assistance letter from a National Credit Regulator (NCR) registered financial institution as follows: • The bank statement should reflect a closing balance of R10 000 000.00 not older than 21 days from date of closure of the RFP, or • The financial assistance letter should be for a minimum of R10 000 000.00 and should not be older than 21 working days from the date of closure of the RFP. • NB: Failure to submit any of the above will lead to automatic disqualification. SASSETA reserves the right to confirm the validity or authenticity of external funding prior to appointment	
9.	Part 9: The Bidding company to submit CV Template (Annexure C) of the Team Leader. Non-submission of the requested CV Template (Annexure C) of the Team Leader will lead to automatic disqualification.	
10.	Part 10: The Bidding company to ensure compliance with the Protection of Personal Information Act (POPIA) and submit a valid registration certificate with the Information Regulator of South Africa in the name of the bidding company. Non-submission of a valid registration certificate(s) with the Information Regulator of South Africa will lead to automatic disqualification.	
11.	Part 11: The bidder to submit a minimum of three (3) signed reference letters on a client's letterhead demonstrating experience in managing the implementation of bursaries At minimum one (1) of the three (3) letters requested above should be for contracts of R50 000 000 and above each and must have been issued within the previous five (5) financial years.	
12.	Part 12: Team leader to demonstrate extensive knowledge and experience in managing the implementation of bursaries and submit the following documents:	

	a. At minimum be in possession of NQF level 7 in Project Management qualification. The qualification certificate to be submitted with the proposal. b. Demonstrate a minimum 10 years' experience in project management. A comprehensive CV template (Annexure C) to be submitted. c. Must have been a team leader on at least three (3) assignments of which one (1) was a contract of R50 000 000 and above. CV template (Annexure C) to elaborate this experience.	
13.	Part 13: A bidder to submit a detailed project implementation plan including a Gantt Chart demonstrating an understanding of the seven (7) scope of work and deliverables items as per section 2.3 (2.3.1.1 – 2.3.1.7)	
14.	Part 14: Bidders to submit: NB.: Non-submission of the below-mentioned documents (under 12) will lead to specific goal points NOT being awarded.	
	Valid Companies and Intellectual Property Commission (CIPC) Company registration documents	
	Certified copy of Identity document of company directors	

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