



**merSETA**

MANUFACTURING, ENGINEERING  
AND RELATED SERVICES SETA

## Request For Proposal (RFP)

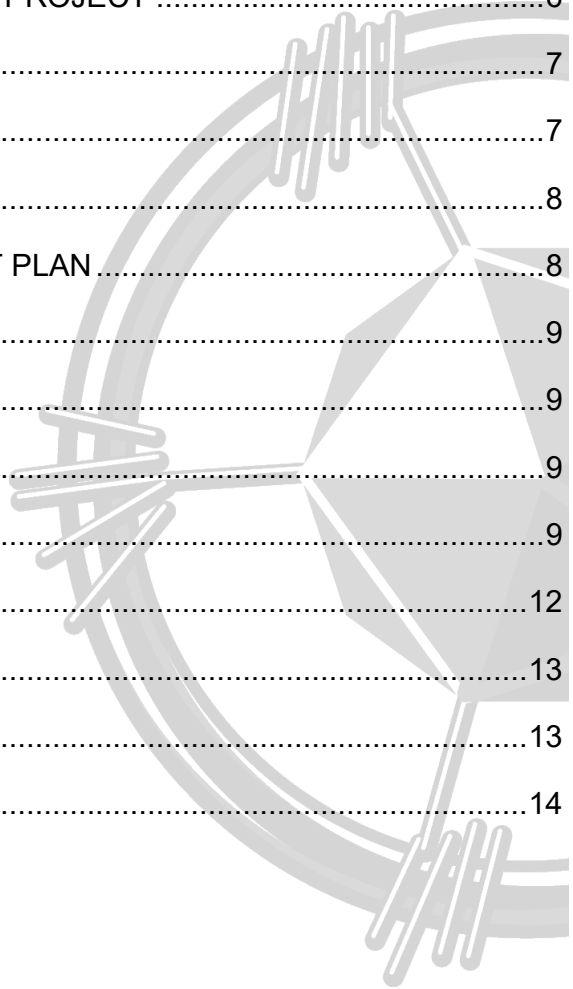
RFP/CFO/25/26/287			
<b>DESCRIPTION</b>		<b>FINANCIAL MANAGEMENT, REPORTING &amp; GRAP 104(R) SUPPORT SERVICES</b>	
<b>CLOSING DATE</b>	<b>16 March 2026</b>	<b>CLOSING TIME</b>	<b>12:00</b>

SUPPLY CHAIN CONTACTS AND ENQUIRIES	
<b>Full Names</b>	Asisipho Matomane
<b>Contact Number</b>	010 219 3293/ 069 008 3467
<b>Email Address</b>	AMatomane@merseta.co.za
<b>RFP Email Address</b>	quotations@merseta.org.za

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Revision Number	Rev 00	Access	Controlled
Reviewed: Senior Manager: Supply Chain and Contract Management		Controlled: Chief Executive Officer	

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**TERMS OF REFERENCE FOR  
FINANCIAL MANAGEMENT, REPORTING & GRAP 104(R) SUPPORT SERVICES**

**1. INTRODUCTION TO REQUEST FOR PROPOSAL (RFP)**

1.1 The Manufacturing, Engineering and Related Services Sector Education and Training Authority (merSETA) is a Schedule 3A public entity established in terms of the Skills Development Act (Act No. 97 of 1998), Registration Number 17/merSETA/01/04/20, to facilitate skills development for the Metal and Engineering, Motor Retail and Components Manufacturing, Automobile Manufacturing, Plastics Manufacturing and New Tyre Manufacturing Sectors Automotive Components Manufacturing Chamber.

**2. BACKGROUND INFORMATION**

2.1 The merSETA, as a public entity, is audited by the Auditor General of South Africa (AGSA). During the 2023/2024 and 2024/2025 financial year regulatory audits, Auditor General of South Africa raised several adverse findings which resulted in the merSETA getting a qualified audit opinion arising primarily from the following areas:

- a) Employer grant and project expenses
- b) Grants and transfer payables
- c) Receivables from non-exchange transactions

2.2 Whilst the Auditors have noted amongst other things, that Management had put in place an action plan and additional controls to address the root causes of the prior year's findings. It was noted that the action plan was not adequately implemented, resulting in repeat audit findings.

2.3 After the audit, a significant number of internal controls relating to contracts management and performance information processes have been implemented to enhance compliance and, in an effort, to address and or resolve material audit exceptions that were identified in recent past.

2.4 One of the interventions deployed as a control self-assessment (CSA) exercise was a high-level review of internal controls project. This project sought to review inter alia the

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internal processes, the accrual process, commitment registers, review and update the accounting policies, and review efficacy of the audit action plan relative to the Management Report issued by the AGSA and the development of standard operating procedures to guide the process of strengthening internal controls.

2.5 Key findings of the review revealed that to remedy the current gaps and make notable progress towards an improved audit opinion, merSETA must undertake a deep dive into the following activities as part of its turnaround efforts:

- a) **Standard operating procedures:** Draft SOPs have been developed. However, there is a need for adaptation support to ensure implementation of the procedures through monitoring activities and change management.
- b) **Documentation:** Records management and documentation need to receive urgent attention as it fundamental for information retrieval in response to auditors.
- c) **Programme monitoring:** Various activities need to be undertaken to streamline programme data for completeness, accuracy and reliability.
- d) **Commitment register:** There's a need to consolidate information on the commitment register to create a single data source.
- e) **Financial statements 2026:** Preparation of GRAP104R calculations and disclosure. The merSETA requires support services in reliably identifying transactions that would trigger accruals, provisions and commitments from the commitment register.

2.6 The self-review exercise revealed that a lot more work still needs to be done for merSETA to progress towards a position of an unqualified audit opinion. The scope of work outline below seeks to urgently address some of the key activities geared towards achieving better audit outcomes.

### 3. INVITATION AND PURPOSE OF ASSIGNMENT

3.1 The purpose of this RFP is to solicit a proposal and to urgently enlist services a of financial management and reporting business advisory consultancy/firm to support merSETA for a period of six (6) months with an option to renew on a month-to-month, for a period not exceeding three (3) months should there be a need for post audit support services.

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3.2 The merSETA therefore invites a suitably qualified and experienced independent service provider to support services in urgently actioning Internal Controls and Activities identified by merSETA as being essential action items that will remedy existing internal control gaps.

#### 4. OBJECTIVES OF THE APPOINTMENT

4.1 The immediate and primary goal for merSETA is to not only to obtain an unqualified audit opinion, but to ensure sustainable compliance and continuous adherence sound internal controls. Considerable efforts have been put towards improving administrative and procedural efficiency, thereby giving effect to entity’s mandate. This position informs the objectives of this project which are:

- a) To give implement recommendations of the internal control’s review exercise thus ensuring that the SOPs and Document Management initiatives are adopted and applied.
- b) Outlining the programme monitoring activities necessary for merSETA to improve and retain better audit outcomes moving forward.
- c) Ensure reliability of commitments, accruals and associated AFS disclosures for 2026.
- d) Develop and customise a GRAP104R-compliant financial instruments model for adoption by merSETA.

#### 5. SCOPE OF WORK

5.1 The scope of work for this project is twofold as the service provider is required to render support services to ensure that merSETA implements and follows through with recommendations of the review close out report. Secondly, the service provider will need to assist in ensuring that the merSETA is aligned with the revised GRAP 104 standard.

5.2 The prospective service provider will be expected to support and assist with the following financial year-end related activities over the contract duration.

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## **PART A – Support Services**

- a) Work with merSETA team to prepare/ review
  - (1) document packs for all discretionary grant contracts
  - (2) provisions, accruals, commitments, payables, expenses, receivables for all contracts
  - (3) adjustments to the AFS with supporting documents
- b) Assist the organisation with preparation of a consolidated commitment register for each year using Excel capabilities

## **PART B – A model for merSETA to be aligned with the revised GRAP 104**

- a) Implement GRAP104R fully retrospectively
- b) Prepare a write-up for the Auditor General on the methodology followed
- c) Perform a review of all work performed to determine audit readiness

## **6. DELIVERABLES / KEY OUTCOMES FOR THE PROJECT**

6.1 The following deliverables are envisaged at the conclusion of the assignment:

- a) Implementation and embedding of improved internal control processes, including finalisation of SOPs, enhanced documentation practices, and support for organisation-wide change management.
- b) Development of a centralised and accurate commitment register that integrates commitments, accruals, provisions, payables, and receivables into a single, reliable data source supported by automated tools.
- c) Review of complete, accurate, and audit-ready year-end documentation packs, including contract schedules, adjustments to the annual financial statements, and all supporting evidence required for AGSA review.
- d) Full retrospective application of the revised GRAP 104(R) standard, including a customised financial-instruments model/ software, enhanced disclosure templates, and alignment of accounting treatments with the revised requirements.
- e) The GRAP 104 model/ software must be integrated with existing systems.
- f) Submission of a formal methodology and technical interpretation pack outlining GRAP 104(R) implementation, accounting judgements, and evidence supporting audit readiness.
- g) A comprehensive review identifying gaps, risks, and corrective measures to improve

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merSETA's readiness for the audit cycle, including recommendations for final adjustments and responses to potential audit queries.

- h) Enhancement of programme data completeness, accuracy, and reliability through improved monitoring activities and clearly defined workflows.
- i) Structured and documented skills-transfer initiatives to ensure merSETA teams are equipped to maintain controls, manage GRAP 104(R) requirements, and sustain improvements beyond the project period.
- j) Monthly progress reports aligned to the project plan and a final project close-out report summarising outcomes, lessons learned, and recommendations for continued compliance and control excellence.

## 7. REQUIRED EXPERTISE AND SKILLS

7.1 The merSETA intends appointing a service provider with extensive experience in financial reporting, management advisory services and interpretation/application of GRAP standards. The service provider must have proven track record and extensive experience in the following:

- a) Company registration - IRBA Individual – Proof of registration with SAICA and IRBA.
- b) Minimum of Six (6) years' experience in public sector financial management environment, especially regarding the preparation of the annual financial statements.
- c) Experience and capacity to provide technical opinions on accounting standard matters or similar engagements in public sector Significant experience in implementation of GRAP standards.
- d) Qualification and expertise of the team to be involved in the project to be in accounting profession, related to financial reporting and application of GRAP standards should be demonstrated and should meet the requirements outlined in the evaluation criteria below.

7.2 At a minimum, the engagement team shall comprise of:

- 1 x Engagement lead
- 3 x Associates

## 8. DURATION OF THE PROJECT

8.1 The contract with the successful service provider is estimated to be for the period of ±6 months to complete *(01 March to 31 August 2026 to be used as an indicative timeline for the proposal and project plan)*.

8.2 The project will commence upon letter of appointment and signing of the contract between merSETA and the service provider.

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## 9. PERFORMANCE AND REPORTING

- 9.1 To facilitate the performance of Service Providers and monitor their scope of work, merSETA
- a) Enter into a Contract / Service Level Agreement (SLA) that will govern the relationship between the parties. The SLA will include project phases that will address each of the project deliverable.
  - b) Establish a reporting task team to manage, monitor and oversee the project. This Task Team will ensure that:
    1. Services are rendered timeously and are aligned to deliverables and outcomes.
    2. Information flows between the Service Provider and merSETA, and vice versa.
    3. Timeframes as far as possible are not extended.
    4. Will render a quality assurance role as the first line contact point; and
    5. Will monitor progress and project costs are not incurred unnecessarily.
- 9.2 The Service Provider will be expected to table progress reports for each deliverable contained in the implementation plan as agreed and in terms of the project plan and SLA.
- 9.3 Monitor the payment schedule that will be attached to the SLA. Payments will therefore only be approved and processed based on the achievement of deliverables as per the implementation plan and/or project plan and related performed project tasks.

## 10. THE PROPOSAL, APPROACH AND PROJECT PLAN

- 10.1 The bidder's proposal shall have sufficient level of detail, in their approach and methodology, whilst portraying practicality in terms of the implementation and the ability to meet the project timelines.
- 10.2 The detailed work-plan/methodology must be linked to a budget reflecting projected costs per the proposed Project implementation Plan that indicates the following.
- a) Clearly defined milestones that are aligned to objectives and expected outputs/ deliverables as outlined in the scope of work described in the Terms of Reference, inclusive of a Skills Transfer plan
  - b) Well defined timelines for each of the activities and deliverables
  - c) Allocation of Human Resources
  - d) Project cost-breakdown outlining the financial implications of activities and deliverables.
- 10.3 Provide examples of at least three similar projects executed in the past with contactable references and contract details of the specific clients.

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## 11. RFP SUBMISSION

11.1 Bid documents may be emailed to [quotations@merseta.org.za](mailto:quotations@merseta.org.za) on or before the closing date and closing time.

11.2 The merSETA will only consider bid documents received on or before the closing date and time.

## 12. LATE SUBMISSIONS OF THE RFP

Submission of quotation(s) received late (after the closing date and time) will not be considered.

## 13. REQUEST FOR PROPOSAL (RFP) RULES

13.1 The following rules will apply for this Request for Proposal:

- a) The price(s) quoted shall be valid for a minimum period of 60 days from the closing date and time of this RFP.
- b) The price(s) quoted must be firm and inclusive of value-added tax (VAT) where applicable.
- c) The price(s) must include all related expenses, i.e., transport, accommodation, etc. (where applicable).
- d) A potential supplier or service provider must be validly registered on the Central Supplier Database (CSD), as hosted by the National Treasury.
- e) Only an official purchase order or appointment letter issued by the merSETA will bind the merSETA.

## 14. RFP EVALUATION PROCESS

14.1 The RFQ will be evaluated in terms of PPPFA 05 of 2000 and Preferential Procurement Regulation 2022 (80/20). Three (3) stages of evaluation process will be undertaken.

### 14.2 Evaluation Stage 1: Compliance

All bidders must comply with the administrative requirements outlined in the Standard Bidding Documents and the mandatory requirements listed below. All bidders failing to provide the required information and documentation in this evaluation stage may face disqualification from further evaluation. Failure to comply with the requirements assessed in Stage 1 (compliance) may lead to the disqualification of bids.

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Criteria Description	Supporting Documents
Firm to be registered with IRBA and the individual proposed must be both IRBA and SAICA registered and the registration must be valid at date of submitting the proposal.	Company registration - IRBA Individual – Proof of registration with SAICA and IRBA.
Bidders must submit a fully complete Bidder's Disclosure form (failure to declare honestly will lead to bidder being disqualified)	Standard Bidding Document (SBD) 4

### 14.3 Evaluation Stage 2: Technical Evaluation

The bids will be evaluated for functionality based on the evaluation criteria and the minimum threshold as shown in the table below. Any bid that fails to meet the overall minimum threshold of **75%** or the minimum score for any individual component thresholds will be disqualified for further evaluation on price and specific goals.

No	Evaluation Criteria	Descriptive Indicators	Points
1.	The bidder must demonstrate the capacity to consult and provide technical opinions.  This relates to individual proposed by the company, not necessarily company experience.	Above Seven (7) years of experience and capacity to provide technical opinions on accounting standard matters or similar engagements in public sector = 30 points	<b>30</b>
		Three (3) to six (6) years of experience and capacity to provide technical opinions on accounting standard matters or similar engagements in public sector = 20 points	
		Less than 3 years of experience and capacity to provide technical opinions on accounting standard matters or similar engagements in public sector = 0 points	
2.	The bidder must submit a minimum of three (3) signed reference letters where the similar services was conducted.  The reference letters must clearly state the period of the project undertaken and must be on the client company letterheads or include verifiable contact details.  <b>Appointment letters will not be regarded as reference letter.</b>	Three (3) or more relevant reference letters attached within the public sector = 30 points	<b>30</b>
		two (2) relevant reference letters attached within the public sector = 20 points	
		one (1) relevant reference letter attached within the public sector = 15 points	
		No or unsatisfactory reference letter(s) attached within the public sector = 0 point	

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No	Evaluation Criteria	Descriptive Indicators	Points
3.	Summarized Curriculum Vitae (CV), Certified Qualifications and Professional Accreditation of the Project Team (Lead Manager and the Associate)  Not older than three (3) months membership status and good standing.	<p>The bidder attached a summarized CV(s) of the proposed team member(s) which reflect a minimum:</p> <p><b>Engagement Lead</b></p> <p>Must be registered with either SAICA or IRBA or equivalent such as ACCA</p> <p>7 years' experience in Financial Management SOP</p> <p><b>CA(SA)/ ACCA</b></p> <p><b>The Associates</b></p> <p>BCom Hons/CTA and completed Articles</p> <p>Post article experience in Public Sector.</p> <p>= 40 points</p> <p><b>Engagement Lead</b></p> <p>Not registered with either SAICA or IRBA or ACCA/ CIMA</p> <p>Less than 7 years' experience implementing Standard Operating Procedures in Finance or related fields.</p> <p><b>The Associate/s</b></p> <p>No BCom Hons/CTA and completed Articles evidence attached</p> <p>No Post article experience in Public Sector.</p> <p>= 0 points</p>	<b>40</b>
<b>TOTAL WEIGHTING</b>			<b>100</b>
<b>MINIMUM WEIGHTING SCORE</b>			<b>75</b>

**NB: Failure to achieve a minimum score for any of the individual criteria above will result in immediate disqualification.**

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#### 14.4 Evaluation Stage 3: Preference Point System

The 80/20 preference point system shall be applicable to this phase, where 80 points represent the maximum obtainable points for the lowest acceptable price and 20 points represent the specific goals. The bid documentation's table below will award points to a bidder for achieving the specific goals.

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)
Tenderer who has 51% to 100% black people ownership	6	
Tenderer who has 30% to 100% black women ownership	4	
Tenderer who has 30% to 100% black youth ownership	4	
Tenderer who has 30% to 100% White women ownership	2	
Tenderer who has 20% or more owners with disability	4	
<b>Total Points allocated to Specific Goals</b>	<b>20</b>	

**Note: Refer to Annexure A for Proof or documentation that may be considered to claim points for specific goal related to persons or categories of persons historically disadvantaged by unfair discrimination.**

#### 15. COST PROPOSAL

- 15.1 All prices must be VAT inclusive (where applicable) and must be quoted in South African Rand (ZAR).
- 15.2 The rates of remuneration will be subject to negotiation, not exceeding the applicable rates as contained in the guidelines:
- 15.3 The “Guideline on Fees for Audits done on behalf of the Auditor-General of South Africa (AGSA)<sup>1</sup>” as issued by the South African Institute of Chartered Accountants (SAICA);
- 15.4 The “Guide on Hourly Fee Rates for Consultants”, as issued by the Department of Public Service and Administration (DPSA); and/or
- 15.5 Remuneration guidelines issued by professional service organisations or regulatory bodies, as may be relevant.

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## 16. PRICING

16.1 The total price that the bidder will charge to render services in accordance with the TOR must be clearly indicated. The bidder must indicate the total cost of the project indicating the breakdown and all the milestones. The total cost/price shall be transposed to the SBD 3.1 Pricing Schedule.

## 17. MERSETA'S RIGHTS

17.1 The merSETA is entitled to amend any bid condition, bid validity period, RFP terms of reference, or extend the bid closing date, all before the bid closing date. All bidders, to whom the RFP documents have been issued and where the merSETA has records of such bidders, may be advised in writing of such amendments in good time, and any such changes will also be posted on the merSETA's website under the relevant tender information. Therefore, before submitting their bid response, prospective bidders should regularly check the website to stay informed about any amendments related to this matter.

17.2 The merSETA reserves the right not to accept the lowest priced bid or any bid in part or in whole. It normally awards the contract to the bidder who proves to be fully capable of handling the contract and whose bid is functionally acceptable and/or financially advantageous to the merSETA.

17.3 The merSETA reserves the right to award this bid as a whole or in part.

17.4 The merSETA reserves the right to conduct site visits at bidder's corporate offices and or at client sites if so required.

17.5 The merSETA reserves the right to consider the guidelines and prescribed hourly remuneration rates for consultants as provided in National Treasury Instruction 02 of 2016/2017: Cost Containment Measures, where relevant.

17.6 The merSETA reserves the right to request all relevant information, agreements, and other documents to verify the information supplied in the bid response. The bidder hereby gives consent to the merSETA to conduct background checks, including FICA verification, on the bidding entity and any of its directors, trustees, shareholders or members.

17.7 The merSETA reserves the right, at its sole discretion, to appoint any number of vendors to be part of this panel of service providers, if applicable (i.e., where a panel is considered).

17.8 The merSETA reserves the right to make a final decision on the interpretation of its tender requirements and responses thereto.

17.9 The merSETA reserves the right to consider the professional conduct and experiences it had with any bidder that rendered similar services to the merSETA in the past 5 years over

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and above the references put forward by the bidder in its response.

## 18. UNDERTAKINGS BY THE BIDDER

- 18.1 By submitting a bid in response to the RFP, the bidder will be taken to have offered to render all or any of the services described in the bid response submitted by it to the merSETA on the terms and conditions and in accordance with the specifications stipulated in this RFQ document.
- 18.2 The bidder shall prepare for a possible presentation should merSETA require such, and the bidder will be required to make such a presentation within five (5) days from the date the bidder is notified or such a time determined by merSETA of the presentation. Such a presentation may include a practical demonstration of products or services as called for in this RFP.
- 18.3 The bidder agrees that the offer contained in its bid shall remain binding upon him/her and receptive for acceptance by the merSETA during the bid validity period indicated in this RFP, and its acceptance shall be subject to the terms and conditions contained in this RFP document read with the bid.
- 18.4 The bidder furthermore confirms that he/she has satisfied himself/herself as to the correctness and validity of his/her bid response; that the price(s) and rate(s) quoted cover all the work/item(s) specified in the bid response documents; and that the price(s) and rate(s) cover all his/her obligations under a resulting contract for the services contemplated in this RFP; and that he/she accepts that any mistakes regarding price(s) and calculations will be at his/her risk.
- 18.5 The successful bidder accepts full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on him/her under the supply agreement and SLA to be concluded with merSETA, as the principal(s) liable for the due fulfilment of such a contract.
- 18.6 The bidder accepts that all costs incurred in the preparation, presentation, and demonstration of the solution offered by it shall be for the account of the bidder. All supporting documentation and manuals submitted with the bid will become merSETA property unless otherwise stated by the bidder(s) at the time of submission.
- 18.7 Should the bidder require to cede a portion of service(s) in relation to the award, the bidder must inform the merSETA in writing and merSETA reserves the right to accept or reject.

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# ANNEXURE A


## Specific Goal Guide – Preferential points (80/20)

This specific goal guide will be used to assist providers in submitting relevant documents to confirm specific goals.

“**Specific goals**” means specific goals as contemplated in section 2 (1) (d) of the Act which may include contracting with persons, or categories of persons, historically disadvantaged by unfair discrimination on the basis of race, gender and disability including the implementation of programmes of Reconstruction and Development programme as published in government gazette No. 16085 dated 23 November 1994.

Please note that:

- **Financial account, management account or auditors’ letter should be submitted confirming turnover of the company determining BBBEE status on Affidavit and B-BBEE CIPC certificate in order for the specific goals can be awarded.**

 Specific goal	80/20 Preference Point system	Example of Submission	Tick if relevant document submitted	Indicate which document have been submitted
Black People Ownership – 51% or more	6	Valid B-BBEE certificate/Affidavit or B- BBEE CIPC		
Black Women Ownership – 30% or More	4	Valid B-BBEE certificate/Affidavit or B- BBEE CIPC		
Black Youth Ownership – 30% or More	4	Valid BBBEE certificate/Affidavit or B- BBEE CIPC		
White Women Ownership – 30% or More	2	Valid B-BBEE certificate/Affidavit or B- BBEE CIPC		
People with Disability (PwD) Ownership	4	Medical certificate		
<b>Total Points allocated to Specific Goals</b>	<b>20</b>			

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<b>AUTHORISATION SIGNATORIES TO CONFIRM RFP</b>			
The employee signing below hereby affirms the accuracy of the information requested for the proposal.			
<b>Supply Chain Management Representative</b>			
<b>Full Names</b>	<b>Nhlanhla Baloyi</b>	<b>Date</b>	<b>13 February 2026</b>
<b>Signature</b>			
<b>Technical Representative</b>			
<b>Full Names</b>	<b>Mosa Malia</b>	<b>Date</b>	
<b>Signature</b>			



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