



Province of the  
**EASTERN CAPE**  
OFFICE OF THE PREMIER

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**APPOINTMENT OF A SERVICE PROVIDER TO MANAGE MENTORING AND COACHING  
PROGRAMME FOR PROGRAM ONE (1) EMPLOYEES IN THE OFFICE OF THE PREMIER  
FOR A PERIOD OF NINE (9) MONTHS.**

**RFQ: OTP-24/25-387**

|                                                           |                        |
|-----------------------------------------------------------|------------------------|
| <b>NAME OF BIDDER:</b>                                    |                        |
| <b>CSD NUMBER:</b>                                        |                        |
| <b>CLOSING DATE:</b>                                      | <b>29 OCTOBER 2024</b> |
| <b>CLOSING TIME:</b>                                      | <b>11:00 am</b>        |
| <b>QUOTE AMOUNT INCLUSIVE OF ALL<br/>APPLICABLE TAXES</b> | <b>R.....</b>          |

**PREPARED BY:  
OFFICE OF THE PREMIER  
PRIVATE BAG X 0047  
BHISHO**

**TENDER BOX**

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**INDEPENDENCE AVENUE, BISHO  
EASTERN CAPE OFFICE OF THE PREMIER  
ECDC BUILDING**



| NOTICE         |                                                                                                                                                                          |
|----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| PROJECT NO.    | PROJECT DESCRIPTION                                                                                                                                                      |
| OTP-24/25- 387 | APPOINTMENT OF A SERVICE PROVIDER TO MANAGE MENTORING AND COACHING PROGRAMME FOR PROGRAM ONE (1) EMPLOYEES IN THE OFFICE OF THE PREMIER FOR A PERIOD OF NINE (9) MONTHS. |

**AVAILABILITY OF DOCUMENTS : 22 OCTOBER 2024**

**CLOSING DATE : 29 OCTOBER 2024**

## NOTICE

Quotations are hereby invited from suitable and qualified SERVICE PROVIDERS for:

**APPOINTMENT OF A SERVICE PROVIDER TO MANAGE MENTORING AND COACHING PROGRAMME FOR PROGRAM ONE (1) EMPLOYEES IN THE OFFICE OF THE PREMIER FOR A PERIOD OF NINE (9) MONTHS.**

Completed RFQ documents) must be emailed to [Sinoluhlu.maya@ecotp.gov.za](mailto:Sinoluhlu.maya@ecotp.gov.za) not later than **11 O'clock on 29 October 2024.**

**ENQUIRIES WITH REGARD TO THIS ADVERT MAY BE DIRECTED TO:**

Admin Enquiries: Sinoluhlu Maya (Ms.)

Email: [Sinoluhlu.maya@ecotp.gov.za](mailto:Sinoluhlu.maya@ecotp.gov.za)

Technical Enquiries: Nokuthula Ngcanga (Ms.)

Email: [nokuthula.ngcanga@ecotp.gov.za](mailto:nokuthula.ngcanga@ecotp.gov.za)



**INVITATION TO BID**

**PART A**

|                                                                                                                                       |                                                                                                                                                                          |               |                                                                          |                                                                                        |                                                                                       |
|---------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|--------------------------------------------------------------------------|----------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| <b>YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE DEPARTMENT OF OFFICE OF THE PREMIER</b>                                      |                                                                                                                                                                          |               |                                                                          |                                                                                        |                                                                                       |
| RFQ NUMBER:                                                                                                                           | OTP-24/25-387                                                                                                                                                            | CLOSING DATE: | 29/ 10/ 2024                                                             | CLOSING TIME:                                                                          | 11:00                                                                                 |
| DESCRIPTION                                                                                                                           | APPOINTMENT OF A SERVICE PROVIDER TO MANAGE MENTORING AND COACHING PROGRAMME FOR PROGRAM ONE (1) EMPLOYEES IN THE OFFICE OF THE PREMIER FOR A PERIOD OF NINE (9) MONTHS. |               |                                                                          |                                                                                        |                                                                                       |
| <b>BID RESPONSE DOCUMENTS MAY BE SUBMITTED BY EMAIL TO Sinoluhlu.maya@ecotp.gov.za</b>                                                |                                                                                                                                                                          |               |                                                                          |                                                                                        |                                                                                       |
| <b>EASTERN CAPE OFFICE OF THE PREMIER</b>                                                                                             |                                                                                                                                                                          |               |                                                                          |                                                                                        |                                                                                       |
| <b>INDEPENDENCE AVENUE</b>                                                                                                            |                                                                                                                                                                          |               |                                                                          |                                                                                        |                                                                                       |
| <b>ECDC BUILDING</b>                                                                                                                  |                                                                                                                                                                          |               |                                                                          |                                                                                        |                                                                                       |
| <b>BISHO</b>                                                                                                                          |                                                                                                                                                                          |               |                                                                          |                                                                                        |                                                                                       |
| <b>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO</b>                                                                                 |                                                                                                                                                                          |               | <b>TECHNICAL ENQUIRIES MAY BE DIRECTED TO:</b>                           |                                                                                        |                                                                                       |
| CONTACT PERSON                                                                                                                        | Sinoluhlu Maya                                                                                                                                                           |               | CONTACT PERSON                                                           | Nokuthula Ngcanga                                                                      |                                                                                       |
| TELEPHONE NUMBER                                                                                                                      |                                                                                                                                                                          |               | TELEPHONE NUMBER                                                         |                                                                                        |                                                                                       |
| FACSIMILE NUMBER                                                                                                                      |                                                                                                                                                                          |               | FACSIMILE NUMBER                                                         |                                                                                        |                                                                                       |
| E-MAIL ADDRESS                                                                                                                        | Sinoluhlu.maya@ecotp.gov.za                                                                                                                                              |               | E-MAIL ADDRESS                                                           | Nokuthula.Ngcanga@ecotp.gov.za                                                         |                                                                                       |
| <b>SUPPLIER INFORMATION</b>                                                                                                           |                                                                                                                                                                          |               |                                                                          |                                                                                        |                                                                                       |
| 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                                                                                  |
| SPECIFIC GOALS CLAIMED                                                                                                                | TICK APPLICABLE BOX]<br><br><input type="checkbox"/> Yes <input type="checkbox"/> No                                                                                     |               | ALL SUPPORTING DOCUMENTATION FOR THE GOALS CLAIMED ATTACHED              |                                                                                        | [TICK APPLICABLE BOX]<br><br><input type="checkbox"/> Yes <input type="checkbox"/> No |
| <b>[ALL DOCUMENTATION REQUIRED FOR THE CLAIM OF PREFERENCE POINTS AS PER THE SPECIFIC GOALS DETAILED IN THE EVALUATION CRITERIA.]</b> |                                                                                                                                                                          |               |                                                                          |                                                                                        |                                                                                       |
| ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?                                         | <input type="checkbox"/> Yes <input type="checkbox"/> No<br>[IF YES ENCLOSE PROOF]                                                                                       |               | ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED? | <input type="checkbox"/> Yes <input type="checkbox"/> No<br>[IF YES, ANSWER PART B:3 ] |                                                                                       |
| <b>QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS</b>                                                                                     |                                                                                                                                                                          |               |                                                                          |                                                                                        |                                                                                       |
| IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?                                                                       |                                                                                                                                                                          |               |                                                                          | <input type="checkbox"/> YES <input type="checkbox"/> NO                               |                                                                                       |
| DOES THE ENTITY HAVE A BRANCH IN THE RSA?                                                                                             |                                                                                                                                                                          |               |                                                                          | <input type="checkbox"/> YES <input type="checkbox"/> NO                               |                                                                                       |
| DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?                                                                            |                                                                                                                                                                          |               |                                                                          | <input type="checkbox"/> YES <input type="checkbox"/> 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

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 2010 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 WITH NON-COMPLIANT TAX STATUS AT DATE OF CLOSING OF BID/ QUOTATION WILL BE NOTIFIED AND GRANTED 7 WORKING DAYS TO RECTIFY THE STATUS.
- 2.3 SHOULD THE STATUS REMAIN NON-COMPLIANT AFTER 7 WORKING DAYS THE BID WILL BE DEEMED NONRESPONSIVE WITHOUT FURTHER COMMUNICATION TO THE BIDDER.
- 2.4 FOR BIDDERS WHO ARE NONVAT VENDORS, ALL BID OFFERS ABOVE R 1 MILLION **MUST** INCORPORATE VAT. SHOULD A BID ABOVE R 1M BE AWARDED TO NONVAT VENDOR THE BIDDER WILL BE REQUIRED TO REGISTER FOR VAT PRIOR TO SIGNING OF CONTRACT.
- 2.5 WHERE BIDDER TENDERED ABOVE R 1 MILLION AND NOT INCLUDED VAT THE TENDERED AMOUNT WILL NOT BE LATER ADJUSTED TO INCLUDE VAT.
- 2.6 THE COMPLIANT TAX STATUS REQUIREMENTS ARE ALSO APPLICABLE TO FOREIGN BIDDERS WHO WISH TO SUBMIT A TENDER OFFER.
- 2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

**NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.**

SIGNATURE OF BIDDER:

.....

CAPACITY UNDER WHICH THIS BID IS SIGNED:

.....

(Proof of authority must be submitted e.g. company resolution)

DATE:

.....



## **1. BACKGROUND**

The Eastern Cape Office of the Premier has identified leadership mentoring and coaching programme as a key intervention for addressing critical human resource challenges such as mismatch of skills, limited capacity and capabilities of employees, the impact of future retirement rates, youth empowerment, and aging workforce.

The program has been deemed necessary for the department considering that there is no succession planning in place whilst the above challenges endure it and can contribute to a risk of losing institutional memory. Seven (7) Youth and twelve (12) Middle Management employees have been identified as beneficiaries of this programme for the period of 9 months.

It is therefore envisaged that leadership mentoring and coaching program will enable the department amongst others to:

- Develop and strengthen the leadership and management of the Office of the Premier
- Promote skills enhancement and career development,
- Promote professional identity,
- Enhance attraction and retention of employees,
- Knowledge management and knowledge transfer,
- Enhance a positive employee culture and work ethic.

## **2. OBJECTIVE**

The objective of this RFQ is to appoint an accredited service provider that will develop and manage a structured leadership mentoring and coaching programme to develop mentees' leadership skills, assist them to achieve career goals, and to advance in department.

## **3. SCOPE OF WORK**

The Service provider is expected to develop and implement leadership coaching and mentoring program including a detailed process on how the coaching and mentoring will be delivered. It must include the follow as part of the program



### **3.1 Phase 1 – Self- discovery assessment**

- 3.1.1 Conduct competency assessment for every mentee
- 3.1.2 Customized plan for every mentee
- 3.1.3 Identify and pair experienced mentors/coaches for each mentee to implement the customized plan

### **3.2 Phase 2 - Strengthening of interpersonal skills (group coaching)**

- 3.2.1 Strengthen the emotional intelligence capabilities of the mentees
- 3.2.2 Enhance Problem solving and critical thinking skills
- 3.2.3 Communication skills
- 3.2.4 Access to networking events and conferences
- 3.2.5 Opportunities to connect with other program participants
- 3.2.6 Change management

### **3.3 Phase 3 - Organisational competencies**

Capacitate mentees on the following:

- 3.3.1 Strategic capabilities and leadership
- 3.3.2 Expert and technical management skills
- 3.3.3 Monitoring and evaluation
- 3.3.4 People management and empowerment program
- 3.3.5 Financial management
- 3.3.6 Change management

### **3.4 Phase 4 - Monitoring and Evaluation**

- 3.4.1 Regular feedback sessions to ensure program meets participant needs
- 3.4.2 Evaluation of coaching and mentoring effectiveness
- 3.4.3 Assessment of program impact on participant career advancement and leadership growth



#### **4. EXPECTED DELIVERABLES**

The Service provider must deliver the following:

- 4.1 An overview of the assessment approach on how they will successfully implement the assessment and management of leadership mentoring programme process.
- 4.2 A project plan outlining activities that make up the expected deliveries.
- 4.3 Provide Office of the Premier with a comprehensive individual assessment reports with recommended actions and developmental areas.
- 4.4 Provide individual and team feedback sessions as per assessment results and mentorship programme.
- 4.5 Develop and present a final report with recommendations based on findings and supported by best practices.
- 4.6 All reports and assessment results remain the intellectual property of the Office of the Premier and must be handed over to the department as part of the leadership Assessment Close out report.
- 4.7 Mentees must be issued with competency certificates that are accreditation by SAQA.

#### **5. COMPETENCY AND EXPERTISE REQUIREMENTS**

Service providers are required to adhere to the following requirements:

- 5.1 Service providers must have an extensive knowledge and understanding of leadership development and career advancement.
- 5.2 Must have a minimum of 3 years' experience as the company in mentoring and coaching/coaching leadership and 5-10 years' experience for team personnels.
- 5.3 Service providers must submit reference letters as evidence of related services previously and successfully conducted. The Reference Letter(s) must be in the letterhead of the previously serviced client and should reflect at least name of the client, description of the services rendered, value of the project, year conducted, year completed, contactable reference name and contact details.
- 5.4 Service providers/ mentors must possess a Comensa Senior Practitioner or Comensa Master Practitioner professional certificate in coaching (Coaches and mentors of South Africa).



## 6. SUBMISSION OF COMPULSORY DOCUMENTS

Service providers must comply with the mandatory requirements and submit all required documents indicated hereunder with the quotation at the time of closing this RFQ.

## 7. MANDATORY REQUIREMENTS

| Mandatory Criteria                                                                                                                                                                                                                                           | Supporting documents                                                                                                                                                                                                                                                                                                                                                                                                                       |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Company Experience</b>                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Minimum of 3 years' experience in Mentoring and coaching or coaching leadership.                                                                                                                                                                             | <ul style="list-style-type: none"> <li>Company profile indicating/ demonstrating the number of years in leadership coaching and mentoring.</li> </ul>                                                                                                                                                                                                                                                                                      |
| Provide a minimum of two (2) relevant projects successfully completed.                                                                                                                                                                                       | <ul style="list-style-type: none"> <li>Service providers must fully complete Annexure A with contactable references reflecting the brief description of the scope and scale of work undertaken for each and indicate the value.</li> <li>Service providers must submit at least two (2) reference letters on clients' letterhead signed by the entity's SCM Head or project manager in line with projects listed in Annexure A.</li> </ul> |
| <b>Proposal with Methodology</b>                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Proposed execution plan to cover the Scope of Work and Project Deliverables                                                                                                                                                                                  | <p>Submit a proposal clearly outlining the methodology and implementation plan:</p> <ul style="list-style-type: none"> <li>The Scope of Work and Project Deliverables.</li> <li>Indicate the assessment tool that will be used in Phase 1.</li> </ul>                                                                                                                                                                                      |
| <b>Team Capacity – Qualifications of Key personnel</b>                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <p>The service provider must demonstrate the capacity of the project team to be utilized in the execution of the contract.</p> <p>The project team should consist of:</p> <ul style="list-style-type: none"> <li>Project leader with a minimum of</li> </ul> | <p>CV of project leader.</p> <ul style="list-style-type: none"> <li>The CVs should clearly state the roles of each team member and not be longer than 3 pages.</li> <li>The CV must provide a brief description of individuals' experience in line with the requirements as indicated in the qualification of</li> </ul>                                                                                                                   |



| Mandatory Criteria                                                                                                                                                                                                                                                                                | Supporting documents                                                                     |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|
| <p>NQF Level 7/8 Qualification and certificate(s) in Mentoring and Coaching.</p> <ul style="list-style-type: none"> <li>• Registration with COMENSA coaches and mentos of South Africa.</li> <li>• Minimum of 5-10 years' experience in Mentoring and Coaching or Coaching Leadership.</li> </ul> | <p>key personnel.</p> <p>Certified copies of qualifications not older than 6 months.</p> |

## 8. COSTING

8.1 Quotations must be itemised and include all costs involved in the execution and delivery of mentoring and coaching program.



**ANNEXURE A– SERVICE PROVIDERS MUST FULLY COMPLETE THE FOLLOWING TABLE INDICATING THEIR TRACK RECORDS AND REFERENCES**

| NO. | COMPANY / CLIENT'S NAME | CONTRACT VALUE | CONTRACT PERIOD | PROJECT DESCRIPTION | CONTACTABLE REFERENCES  |              |                               |
|-----|-------------------------|----------------|-----------------|---------------------|-------------------------|--------------|-------------------------------|
|     |                         |                |                 |                     | NAME OF CONTACT PERSONS | WORK ADDRESS | E-MAIL WORK TELEPHONE NUMBERS |
| 1.  |                         |                |                 |                     |                         |              |                               |
| 2.  |                         |                |                 |                     |                         |              |                               |
| 3.  |                         |                |                 |                     |                         |              |                               |
| 4.  |                         |                |                 |                     |                         |              |                               |
| 5.  |                         |                |                 |                     |                         |              |                               |



**PRICING SCHEDULE – FIRM PRICES  
(PURCHASES)**

**NOTE: ONLY FIRM PRICES WILL BE ACCEPTED. NON-FIRM PRICES (INCLUDING PRICES SUBJECT TO RATES OF EXCHANGE VARIATIONS) WILL NOT BE CONSIDERED**

|                     |                                      |
|---------------------|--------------------------------------|
| Name of bidder..... | Bid number: <b>OTP- 24/25- 387</b>   |
| Closing Time 11:00  | Closing date: <b>29 October 2024</b> |

| ITEM NO. | DESCRIPTION                   | QTY                       | UNIT PRICE | TOTAL PRICE IN CURRENCY<br>**(ALL APPLICABLE TAXES INCLUDED) | RFQ RSA |
|----------|-------------------------------|---------------------------|------------|--------------------------------------------------------------|---------|
| 1        | Phase 1 of the scope of works | 19                        |            |                                                              |         |
| 2        | Phase 2 of the scope of works | 19                        |            |                                                              |         |
| 3        | Phase 3 of the scope of works | 19                        |            |                                                              |         |
| 4        |                               | Sub Total                 |            |                                                              |         |
| 5        |                               | Vat (15%) – if applicable |            |                                                              |         |

**TOTAL AMOUNT CARRIED TO FORM OF BID**

**R.....**



- Required by: .....
- At: .....  
.....
- Brand and model .....
- Country of origin .....
- Does the offer comply with the specification(s)? \*YES/NO
- If not to specification, indicate deviation(s) .....
- Period required for delivery .....  
\*Delivery: Firm/not firm
- Delivery basis .....

Note: All delivery costs must be included in the bid price, for delivery at the prescribed destination.

\*\* "all applicable taxes" includes value- added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies.

\*Delete if not applicable



## 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 interest<sup>1</sup> 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 |
|-----------|-----------------|---------------------------|
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |

<sup>1</sup> 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.



2.2 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 consortium<sup>2</sup> will not be construed as collusive bidding.

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<sup>2</sup> 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



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

### PRICE QUOTATION PROCESS (UP TO R 1 MILLION)

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

#### **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) **80/20 preference point system** will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

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

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

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

The maximum points for this tender are allocated as follows:

|                                                  | POINTS     |
|--------------------------------------------------|------------|
| PRICE                                            | 80         |
| SPECIFIC GOALS                                   | 20         |
| <b>Total points for Price and SPECIFIC GOALS</b> | <b>100</b> |



- 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.
- 1.7 Bidders who wish to claim points in terms of table 4.2 below need to provide proof for each point claimed as guided below:
- Who had no franchise in national elections before the 1983 and 1993 Constitution – **attach certified copy of identity document (ID) and company registration document / CSD report to show/ substantiate percentage ownership equity.**
  - Who is female- **attach certified copy of identity document (ID) and company registration document / CSD report to show/ substantiate percentage ownership equity.**
  - Who has a disability – **attach doctor's letter confirming the disability**
  - Who is youth - **attach certified copy of identity document (ID) and company registration document / CSD report to show/ substantiate percentage ownership equity.**

## 2. DEFINITIONS

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

## 3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

### 3.1. POINTS AWARDED FOR PRICE

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

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

**80/20**

**or**

**90/10**



$$P_s = 80 \left( 1 - \frac{P_t - P_{min}}{P_{min}} \right) \quad \text{or} \quad P_s = 90 \left( 1 - \frac{P_t - P_{min}}{P_{min}} \right)$$

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

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

#### 3.2.1. POINTS AWARDED FOR PRICE

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

|                                                             |           |                                                             |
|-------------------------------------------------------------|-----------|-------------------------------------------------------------|
| <b>80/20</b>                                                | <b>or</b> | <b>90/10</b>                                                |
| $P_s = 80 \left( 1 + \frac{P_t - P_{max}}{P_{max}} \right)$ | <b>or</b> | $P_s = 90 \left( 1 + \frac{P_t - P_{max}}{P_{max}} \right)$ |

Where

- $P_s$  = Points scored for price of tender under consideration  
 $P_t$  = Price of tender under consideration  
 $P_{max}$  = Price of highest acceptable tender

## 4. POINTS AWARDED FOR SPECIFIC GOALS

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

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

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

***Note to tenderers: The tenderer must indicate how they claim points for each preference***



point system.)

| The specific goals allocated points in terms of this tender                    | Number of points allocated (80/20 system) | Percentage ownership equity (To be completed by the tenderer) | Number of points claimed (80/20 system) (To be completed by the tenderer) |
|--------------------------------------------------------------------------------|-------------------------------------------|---------------------------------------------------------------|---------------------------------------------------------------------------|
| I. Who had no voting rights in elections before the 1983 and 1993 Constitution | 3                                         |                                                               |                                                                           |
| II. Who is Women                                                               | 5                                         |                                                               |                                                                           |
| III. Who has a disability                                                      | 5                                         |                                                               |                                                                           |
| IV. Who is youth                                                               | 5                                         |                                                               |                                                                           |
| V. Enterprise located in Eastern Cape                                          | 2                                         |                                                               |                                                                           |

#### 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:

- The information furnished is true and correct;
- The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- 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.

|                                    |       |
|------------------------------------|-------|
| .....                              |       |
| <b>SIGNATURE(S) OF TENDERER(S)</b> |       |
| <b>SURNAME AND NAME:</b>           | ..... |
| <b>DATE:</b>                       | ..... |
| <b>ADDRESS:</b>                    | ..... |
|                                    | ..... |
|                                    | ..... |
|                                    | ..... |

