national treasury
Department:
National Treasury
REPUBLIC OF SOUTH AFRICA

MEMORANDUM

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To: Unathi Ngwenya
Chief Financial Officer

From: RSA Retail Bonds
Division: Asset and Liability Management
Doc ref:
Date: 24 April 2026

REQUEST FOR DEVIATION FROM NORMAL SUPPLY CHAIN MANAGEMENT PROCEDURES FOR RENEWAL OF THE HELLOPETER SUBSCRIPTION FOR A PERIOD OF THREE (3) YEARS

1. PURPOSE

1.1 To obtain the Chief Financial Officer's approval for the deviation from the normal supply chain management procedures, to renew the Hellopeter subscription for a period of three (3) years.

2. INTRODUCTION AND BACKGROUND

2.1 The RSA Retail Savings Bonds directorate currently subscribes to the Hellopeter platform, which is used to monitor, manage, and respond to public complaints, queries, and feedback relating to RSA Retail Savings Bonds and associated services.

2.2 The subscription is due to expire on 3 July 2026. In order to ensure continuity in stakeholder engagement and reputation management, a renewal is required.

2.3 A quotation has been received for the renewal of the subscription for a three-year period, attached as Annexure 'A'.

2.4 Hellopeter serves as a key public platform where investors and members of the public share feedback and raise concerns. The platform enables the department to:

- Monitor public sentiment and identify recurring issues;
- Respond promptly to investor complaints and queries;
- Enhance transparency and accountability in service delivery; and
- Protect and manage the reputation of RSA Retail Savings Bonds

2.5 Continued access to the platform will ensure that the department remains responsive to stakeholders and is able to proactively address concerns that may impact investor confidence.

2.6 Failure to renew the subscription may result in delayed responses to public complaints, reduced visibility of stakeholder concerns, and potential reputational risk

3. LEGISLATIVE BACKGROUND

GENERIC LEGAL BACKGROUND

3.1 Regulation 16A6.4 gives authority to the accounting officer to dispense with a procurement process to the extent that they are rendered impractical by prevailing circumstances and to record the reasons for deviation. It states that if in a specific case it is impractical to invite competitive bids, the accounting officer or accounting authority may procure the required goods or services by other means, provided that the reasons for deviating from inviting competitive bids must be recorded and approved by the accounting officer or accounting authority.

3.2 Paragraph 4 of Instruction No. 3 of 2021/22, a binding instrument under the PFMA, regulates deviations from normal bidding process. Its purpose is to define parameters of procurement by "other means". As a start, the provisions of Regulation 16A6.4 are repeated in sub- paragraph 4.1 of Instruction No. 3 of 2021/22.

3.3 In terms of sub-paragraph 4.2 of Instruction No. 3 of 2021/2022, procurement by "other means" for the purposes of regulation 16A6.4 includes:

a) limited bidding;

b) written price quotations not within the threshold determined by National Treasury Instruction; and

c) procurement that occurs in emergency situations and urgent cases.

3.4 Sub-paragraphs 4.3 and 4.4 of Instruction No. 3 of 2021/2022 require the Supply Chain Management ("SCM") Policy of the National Treasury to at least provide for procurement by "other means" referred to in paragraph 4.2(a), (b) and (c), and any other procurement by "other means" that may be utilised. In essence, allowing for additional circumstances that may be considered "other means" of procurement in addition to those listed in paragraph 3.3 above.

SPECIFIC LEGAL REQUIREMENTS PER CIRCUMSTANCE

3.5 The SCM Policy of the National Treasury sets out, in sub-paragraph 4.5.7, circumstances under which the National Treasury may deviate from the normal procurement process.

3.6 The National Treasury is allowed to deviate from a normal procurement process with reasons for deviating in the appointment of a service provider where there is a single provider only.

3.7 This sole source / supplier procurement constitutes a permissible deviation circumstance in terms of the approved NT SCM policy.

4. FINANCIAL IMPLICATIONS

4.1 The cost of renewing the subscription will amount to R26,044.28 for a period of three (3) years.

4.2 Funds are available under the budget of Liability Management division.

4.3 The renewal of the subscription is a line item on the approved demand plan, see attached annexure '**B**'.

5. CONTRACTUAL IMPLICATIONS

5.1 Following the approval of this memorandum, a service level agreement will be entered into between the National Treasury and Hellopeter (the service provider) or an order will be issued. The service level agreement will state in detail the services to be rendered.

6. FINANCIAL DELEGATIONS

6.1 According to the approved financial delegation issued in terms of section 44 of the PFMA, item 99 states that "the reasons for deviating from inviting quotations or competitive bids must be properly recorded and be in line with the supply chain management practice notes issued from time to time. All deviations from standard procedures or thresholds due to amongst others: emergency or urgent cases below R1 million must be considered and be approved by the Chief Financial Officer."

7. RECOMMENDATION

7.1 It is recommended that the Chief Financial Officer approves:

7.1.1 The deviation from normal supply chain management procedures to procure by other means since this sole source qualifies for limited bidding.

7.1.2 The renewal of the Hellopeter subscription for a period of three (3) years at a cost of R26,044.28.

Compiled by Nelson Ngebane – Assistant Director RSA Retail Bonds

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RENEWAL OF THE HELLOPETER SUBSCRIPTION FOR A PERIOD OF THREE (3) YEARS

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☑ Funds available ☐ Not available

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RENEWAL OF THE HELLOPETER SUBSCRIPTION FOR A PERIOD OF THREE (3) YEARS

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☑ Approved ☐ Not approved ☐ Approved with comments

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