



**National
Research
Foundation**

Invitation to Quote

YOU ARE HEREBY INVITED TO QUOTE FOR REQUIREMENTS LISTED IN THIS DOCUMENT

**Quote Number:
RIISA/RFQ 2026/27:130**

SHORT DESCRIPTION OF REQUIREMENT

THE NRF INTENDS TO APPOINT A SUITABLY QUALIFIED AND EXPERIENCED SERVICE PROVIDER TO DEVELOP A COMPREHENSIVE TOTAL REWARDS FRAMEWORK AND LINKED POLICIES, SUPPORTED BY RELEVANT STANDARD OPERATING PROCEDURES (SOPS), FOR APPLICATION ACROSS THE ORGANISATION.

INVITATION TO QUOTE (SBD 1A)	
Quote Number	RIISA/Rfq 2026/27:130
Closing Date	30 October 2026
Closing Time (As Per NRF Systems)	11h00am
Response Documents	Bid submission must be through the National Treasury e-submission portal, using the following link - https://admin.etenders.gov.za/Identity/Account/Login?ReturnUrl=%2F/
Instructions for Bid Submission:	Login to https://admin.etenders.gov.za/Identity/Account/Login?ReturnUrl=%2F/ using your CSD login details. Go to the 'search by' drop down menu. Select 'tender number'. Enter the tender number - RIISA/Rfq 2026/27:130 Click the plus + icon to expand. Scroll down and click 'start e- submission'. Note: Bids submitted using any other method than that prescribed above will not be accepted.
Bidding procedure and technical information enquiries	tender.enquiries@nrf.ac.za do not submit your bid to this mailbox, it is strictly for enquiries
FRAUD ALERT!	
It is common for scammers to call bidders pretending to be NRF's employees and offering to swing tenders your way for a fee. Do not fall for it, it is a scam! The NRF would never offer payment or any other consideration in return for the favourable consideration of a bid. Please report any suspected acts of fraud or corruption to the following toll-free number - 0800 701 701 or SMS 39772.	
HIGH LEVEL SUMMARY OF REQUIREMENTS	
The National Research Foundation (NRF) seeks to appoint a service provider to: - Develop fit-for-purpose Total Rewards Framework, Linked Policies, SOPs, forms, templates, governance structures and delegations. - Establish Total Rewards monitoring and reporting measures/processes that support management and	

governance decision-making.

- Provide a practical, phased implementation, change, communication and knowledge-transfer plan that enables sustainable internal administration of the framework linked policies.
- The Framework must provide the strategic design and rationale (the “what” and “why”), while the Policy must translate the framework into clear operational rules, governance requirements and administrative processes (the “how” and “when”). The work must align with the NRF’s strategic objectives and remuneration philosophy and provide a coherent basis for the design, implementation, governance and administration of total rewards across the organisation.

SUPPLIER INFORMATION

Name Of Bidder

Postal Address

Street Address

Telephone Number

Code

Number

Cell Phone Number

Code

Number

Facsimile Number

Code

Number

E-Mail Address

VAT Registration Number

**Tax
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

SUPPLIER INFORMATION			
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 the questionnaire below]
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.			
TERMS AND CONDITIONS FOR BIDDING (SBD 1B)			
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. Bid pages are bound to minimise risk of lost pages.		
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) with its special conditions of contract, and, if applicable, any other legislative requirements.		
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.		

TERMS AND CONDITIONS FOR BIDDING (SBD 1B)		
3. TWO ENVELOPE SYSTEM	No	
4. VALIDITY PERIOD FROM DATE OF CLOSURE	90 days	
5. THE BIDDING SELECTION PROCESS		
<u>Stage 1 - Compliance to submission requirements</u>		
Bidders warrant that their proposal document has, as a minimum; the specified documents required for evaluating their proposals as set out in the Returnable Document List and conform to all the terms, conditions, and specifications as set out in this document.		
<u>Stage 2 - Evaluation of Bids against Technical Specifications</u>		
Bidders achieving the minimum threshold in the specification to enter the Price/Preference scoring stage:		
<u>Stage 2A - Evaluation of Bids against Specifications including Quality</u>		
The NRF evaluates each bidder's written response to the specifications issued in accordance to published evaluation criteria set as in Section D.		
<u>Stage 2B - Due Diligence Interviews or Proof of Delivery/Concept against Specifications</u>		
Where circumstances justifies it, the NRF conducts interviews with shortlisted bidders for them to present further information or provide further proof to the evaluation committee. In these cases, the National Research Foundation provides the areas of concern to the short listed bidders to address in their presentations with this document and, where necessary, may provide further areas of concern to the short listed bidders at this stage.		
<u>Stage 2C - Due Diligence Research</u>		
The National Research Foundation confirms the recommended bidder(s)'s reference letters with referees to confirm the recommendation(s).		
<u>Stage 3 - Price/Preference Evaluation</u>		
<u>Basis of fair competition:</u>		
The NRF compares each bidder's pricing proposal on an equal and fair comparison basis equitable to all bidders, taking into account all aspects of the bid's pricing requirements including the application of fair pricing tests as set out below in the section "Insufficiency of Funds".		
<u>Ranking of the bidders pricing:</u>		
The NRF ranks the qualifying bids on price with lowest priced Bid receiving the maximum points (either 80 or 90) and the remainder ranked in relation to the lowest priced bid. The NRF adds the bidders' claimed preference points as verified to the submitted preference claim form (SBD 6.1) to provide the final ranking for the award decision.		
<u>Stage 4 - Checking Tax Compliance</u>		
<u>Stage 4A - Taxpayers Resident in South Africa</u>		
The NRF notifies the recommended bidder in writing where their tax compliance check reflects that they are non-compliant and provides the recommended bidder seven (7) working days to submit written proof from SARS of their tax compliance status or proof that they have made an arrangement with SARS to meet their outstanding tax obligations. Failure to deliver such written evidence of compliance results in the rejection of that recommended bid.		

TERMS AND CONDITIONS FOR BIDDING (SBD 1B)

Stage 4B - Non-Resident Foreign Bidders

Where foreign bidders are submitting a bid, they complete all sections of the SBD1 especially the tax questionnaire. The NRF submit the Foreign Bidder's completed SBD1 to the South African Revenue Service to obtain from the South African Revenue Service the Confirmation of Tax Obligations letter. Where South Africa Revenue Services does not issue the letter, Stage 4A applies in clearing the reason for not receiving the letter.

Stage 5 - Award and Contract Signing

The NRF nominates the bidder with the highest combined score for the contract award subject to the bidder having supplied the relevant administrative documentation.

6. ACKNOWLEDGEMENT OF READING EACH PAGE

The bidder warrants by signature in this document that the bidder has read and accepts each page.

7. CENTRAL SUPPLIER DATABASE REGISTRATION

Bidders are requested to register on the Central Supplier Database and to include in their bid their Master Registration Number (Supplier Number) in order to enable the NRF to verify the supplier's tax status on the Central Supplier Database.

8. CLARIFICATION

If the respondent wishes to clarify aspects of this request or the acquisition process, they contact the officials listed under the enquiries section above. The National Research Foundation does not provide the origin of the request to any party.

9. RESPONSE PREPARATION COSTS

The NRF is not liable for any costs incurred by a bidder in the process of responding to this Bid Invitation, including on-site presentations.

10. COLLUSION, FRAUD AND CORRUPTION

Any effort by Bidder/s to influence evaluation, comparisons, or award decisions in any manner will result in the rejection and disqualification of the bidder concerned.

11. FRONTING

The NRF, in ensuring that bidders conduct themselves in an honest manner will, as part of the bid evaluation processes where applicable, conduct or initiate the necessary enquiries/investigations to determine the accuracy of the representation made in the bid documents. The onus is on the bidder to prove that fronting does not exist, should the National Research Foundation establish and notify the bidder of potential breaches of any of the fronting indicators as contained in the Department of Trade and Industry's "Guidelines on Complex Structures and Transactions and Fronting". Failure to do so within a period of 7 days from date of notification will invalidate the bid/contract and may also result in the restriction of the bidder to conduct business with the public sector for a period not exceeding 10 years, in addition to any other remedies the NRF may have against the bidder concerned.

12. DISCLAIMERS

The NRF has produced this document in good faith. The NRF, its agents, and its employees and associates do not warrant its accuracy or completeness. The NRF makes no representation, warranty, assurance, guarantee or endorsements to any provider/bidder concerning the document, whether with regard to its accuracy, completeness or otherwise and the NRF shall have no liability towards the responding service providers or any other party in connection therewith.

13. CANCELLATION OF THE QUOTATION PRIOR TO AWARD

Procurement not required: The NRF cancels the Bid Invitation prior to making an award if due to changed circumstances there is no need for the specified procurement in the document.

No Acceptable Quotations: The NRF cancels the Quotation Invitation prior to making an award if it receives no acceptable bids i.e. that do not meet the minimum requirements set out in this document.

Invalid Bid Procedure: The NRF cancels the Quotation Invitation prior to making an award if a material irregularity occurred in the bid process.

Insufficiency of Funds or Quotations not within a fair price range: The NRF cancels the Quotation Invitation prior to making an award if the funds are no longer available to cover the total envisaged expenditure or if the price offered by the bidder scoring the highest points is not market related.

The NRF conducts fair pricing tests to arrive at an opinion of reasonableness of the bid price offered. Where these tests reflect pricing outside of the established fair price range, the evaluators may recommend price negotiation. The NRF only negotiates price, and no other component, with the winning bidder or, where that bidder refuses negotiation, with the next ranked bidder in the price/preference ranking until a market related price is achieved.

SBD 1 SIGNATURE

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:

SCOPE OF WORK

INTRODUCTION TO THE NRF

The National Research Foundation Act, Act 23 of 1998, establishes the National Research Foundation ("NRF") as the juristic person that makes this bid invitation and will contract with the awarded bidder. The Public Finance Management Act classifies the organisation as a Schedule 3A Public Entity.

CONTEXT OF THIS PROCUREMENT

The National Research Foundation (NRF) seeks to appoint a suitably qualified and experienced service provider to develop a comprehensive and integrated Total Rewards Framework and linked Total Rewards Policy and supporting SOP. The procurement is intended to establish a consistent, equitable, market-aligned and sustainable approach to employee rewards, covering both financial and non-financial reward elements. The assignment will support effective reward governance, employee attraction and retention, performance alignment, internal equity and the organisation's broader strategic objectives.

The Total Rewards Framework must provide the strategic design, principles and rationale for the organisation's approach to total rewards (the "what" and "why"), while the Total Rewards Policy and SOPs must translate the framework into clear governance requirements, rules and practical processes for implementation and administration (the "how" and "when"). The work must align with the NRF's strategic objectives and compensation philosophy, as well as its existing remuneration and pay practices, and provide a coherent basis for the design, implementation, governance and administration of total rewards across the organisation.

CONTRACT PERIOD

The contract period for this bid contract is three (3) months from the day of the last signature on the contract

DESCRIPTION OF GOODS/DETAILED SPECIFICATION

1. Background and Purpose

The organisation requires the services of a suitably qualified and experienced service provider to develop a comprehensive Total Rewards Framework, Total Rewards Policy and supporting Standard Operating Procedures (SOPs) that provide a structured, integrated, equitable and sustainable approach to employee rewards.

The assignment must establish a clear and practical approach to managing the organisation's financial and non-financial rewards, while ensuring alignment with the organisation's strategic objectives, organisational structure, workforce requirements, employee value proposition, affordability, governance requirements and applicable legislative and regulatory requirements.

The resulting framework, policy and SOPs must provide a clear basis for how the organisation attracts, retains, motivates, recognises, develops and rewards employees.

2. Detailed Specification

The appointed service provider shall undertake a comprehensive assessment, design and documentation process covering, at a minimum, the following:

2.1. Review of the Existing Reward Environment

The service provider must conduct a detailed review of the organisation's existing reward arrangements, policies, practices, structures and related documentation, including, where applicable:

- Remuneration structures and salary practices.
- Job grades, levels and salary ranges.
- Short-term and/or long-term incentive arrangements.
- Employee benefits and allowances.
- Recognition and reward practices.
- Employee wellness and wellbeing initiatives.
- Learning, development and career-development opportunities.
- Performance management and its linkage to reward.
- Flexible working and other employment-value propositions.
- Existing remuneration, benefits and reward policies.
- Existing procedures, processes and governance arrangements.

The review must identify key gaps, inconsistencies, duplication, risks, control weaknesses and opportunities for improvement.

2.2. Total Rewards Philosophy

The service provider must develop a clearly defined Total Rewards Philosophy setting out the organisation's overall approach to rewarding employees.

The philosophy should address, at a minimum:

- Principles underpinning the organisation's reward approach.
- Internal equity and consistency.

- External market competitiveness.
- Pay-for-performance principles, where applicable.
- Recognition of employee contribution and performance.
- Affordability and financial sustainability.
- Attraction and retention of critical skills.
- Differentiation based on performance, responsibility, skills and/or contribution.
- Transparency and appropriate governance.
- Alignment between reward and organisational strategy.

2.3. Total Rewards Framework

The service provider must develop an integrated Total Rewards Framework incorporating an appropriate combination of financial and non-financial reward elements.

The framework should consider, as applicable:

Financial rewards

- Base remuneration.
- Variable Pay
- Salary structures and salary progression.
- Short-term incentives.
- Long-term incentives, where appropriate.
- Performance-related pay.
- Allowances and other cash-based benefits.

Benefits

- Retirement and pension-related benefits.
- Medical and healthcare benefits.
- Leave-related benefits.
- Insurance and risk benefits.
- Other employee benefits applicable to the organisation.

Non-financial rewards

- Employee recognition.
- Career development and progression.
- Learning and development.
- Leadership and talent development.
- Employee wellbeing.
- Work-life balance and flexibility.
- Employee experience.
- Organisational culture and working environment.
- Opportunities for growth and meaningful work.

Pay Structure

The service provider should recommend, where applicable:

- Number of salary grades/bands.

- Minimum, midpoint and maximum.
- Pay range widths.
- Market reference points.
- Salary progression principles.
- Pay positioning.
- Promotion principles.
- Starting salary principles.
- Market adjustment principles.
- Treatment of employees below/above range.

The framework must clearly demonstrate how the various reward elements operate together as an integrated employee value proposition.

2.4. Remuneration Structure and Internal Equity

The service provider must assess the organisation's existing remuneration structure and provide recommendations regarding:

- Alignment of job levels/grades with remuneration.
- Internal pay equity and consistency.
- Appropriate salary ranges or pay bands.
- Minimum, midpoint and maximum positioning, where appropriate.
- Salary progression principles.
- Appropriate mechanisms for managing employees within salary ranges.
- Treatment of employees who are below or above recommended salary ranges.
- Principles for remuneration adjustments and salary reviews.
- Identification of potential pay compression, inequity or structural inconsistencies.

Where material gaps are identified, the service provider should recommend appropriate interventions. The service provider should not assume that a full job evaluation exercise is required unless this is specifically proposed and priced separately.

2.5. External Market Competitiveness

The service provider must undertake an appropriate remuneration and benefits benchmarking exercise using credible and relevant market information.

The assessment should consider:

- Selection of appropriate comparator organisations/peer groups.
- Relevant job and occupational comparisons.
- Benchmark remuneration levels.
- Total remuneration and benefits.
- Market positioning.
- Relevant market trends and practices.

The service provider must document the methodology, comparator group, data sources and assumptions used in the benchmarking exercise.

2.6. Performance and Reward Linkage

The service provider must assess and recommend an appropriate relationship between employee performance and reward, including:

- Performance management outcomes.
- Salary progression.
- Performance-related increases.
- Incentive arrangements.
- Recognition mechanisms.
- Differentiation between levels of performance.
- Appropriate controls to promote consistency and fairness.

Recommendations must take into account the organisation's existing performance management arrangements and identify any changes required to support the proposed reward framework.

2.7. Employee Value Proposition

The service provider must assess the broader employee value proposition and identify how financial and non-financial rewards can be integrated to support:

- Employee attraction.
- Employee retention.
- Employee engagement.
- Talent development.
- Critical and scarce skills.
- Employee wellbeing.
- Career growth and progression.

The proposed framework should recognise that total rewards extend beyond direct remuneration and provide a coherent employee value proposition.

2.8. Total Rewards Policy

The service provider must develop a comprehensive Total Rewards Policy that formally establishes the organisation's approach, principles, governance requirements and rules for the administration of total rewards.

The policy must, at a minimum, address:

- Purpose and objectives.
- Scope and application.
- Definitions and terminology.
- Total Rewards Philosophy and principles.
- Roles and responsibilities.
- Remuneration principles and structures.
- Salary administration and progression (Salary Adjustment Guidelines)
- Benefits and allowances.
- Performance-related rewards and incentives.
- Recognition and reward.
- Career development and non-financial rewards.
- Market benchmarking and remuneration reviews (Market Adjustment Guidelines).

- Internal equity and pay consistency.
- Management of exceptions and deviations.
- Reward governance and approval authorities.
- Confidentiality and appropriate handling of remuneration information.
- Review and maintenance of the policy.
- Compliance with applicable legislation, regulations and organisational governance requirements.
- Executive Remuneration Guidelines

The policy must be written in a clear, practical and implementable format and must be aligned with the approved Total Rewards Framework.

2.9. Standard Operating Procedures (SOPs)

The service provider must develop detailed Standard Operating Procedures (SOPs) to support the consistent and effective implementation and administration of the Total Rewards Policy and Framework.

The SOPs must provide clear, step-by-step procedures for relevant reward processes and should, at a minimum, cover the following, where applicable:

- Annual remuneration review process.
- Salary adjustment and salary progression process.
- Promotion-related remuneration adjustments.
- Appointment and placement within salary ranges.
- Management of employees below or above salary ranges.
- Remuneration benchmarking and market review process.
- Performance-related reward process.
- Incentive and bonus administration.
- Allowance and benefit administration.
- Recognition and reward process.
- Reward-related employee queries and dispute/escalation process.
- Management of remuneration exceptions and deviations.
- Approval and authorisation processes.
- Reward data management and reporting.
- Periodic review of reward structures and practices.

Each SOP should clearly define, as applicable:

- Purpose.
- Scope.
- Roles and responsibilities.
- Process steps.
- Required inputs and documentation.
- Approval requirements.
- Delegations and decision points.
- Timelines/service standards.
- Required controls.
- Records and documentation to be retained.
- Escalation procedures.
- Relevant forms, templates or supporting tools.

The SOPs must be sufficiently detailed to enable the responsible employees and managers to consistently administer the Total Rewards Policy without reliance on undocumented practices or individual interpretation.

2.10. Reward Governance

The service provider must develop appropriate reward governance principles covering:

- Roles and responsibilities.
- Authority and decision-making.
- Approval requirements.
- Delegations of authority.
- Management of exceptions.
- Promotion through recruitment and appointment decisions.
- Reward review cycles.
- Benefits governance.
- Reward risk management.
- Policy ownership and oversight.
- Data and confidentiality considerations.
- Monitoring and reporting.
- Periodic review of the Total Rewards Framework, Policy and SOPs.

The governance arrangements must promote consistent, transparent, controlled and appropriately authorised reward decision-making. The framework should clearly identify responsibilities for the Board, relevant Board Committee, Executive Management, Human Resources, Finance and line management, as applicable.

3. Applicable legal, regulatory and governance context

The development of the Total Rewards Framework, Policy and supporting SOPs must take place within the applicable South African legislative, regulatory and governance environment. The service provider must ensure that all recommendations and deliverables comply with applicable legislation, regulations, government/soe prescripts and recognised good governance principles relevant to remuneration, employee benefits, employment practices and reward administration.

The assignment must also take into consideration the NRF's existing compensation philosophy, Remuneration Policy, HR policies and procedures, delegations of authority, governance arrangements and other applicable internal policies and controls.

The service provider will be required to identify and consider any applicable legal, regulatory or governance requirements that may impact the design, implementation and administration of the Total Rewards Framework, Policy and SOPs, and ensure that the final deliverables are appropriately aligned to such requirements.

4. Scope boundaries

The service provider is expected to review and consider the interfaces between the Total Rewards Framework and existing People and Culture frameworks, including PMDS, talent management, organisational design, learning and development and other relevant HR systems. However, the assignment must not extend into a full redesign of these areas unless expressly approved in writing by the NRF. Where the review identifies additional work or areas requiring further development, the service provider must clearly distinguish between mandatory in-scope deliverables and optional or future recommendations for NRF consideration. Any material changes to the agreed

scope must be managed through the NRF's applicable governance and change-control processes.

5. Phase 1 - Current-State Diagnostic

The successful service provider must begin with a structured current-state assessment. Recommendations may not be finalised before the service provider has established the existing architecture, data quality, policy environment, practices, risks and stakeholder requirements.

5.1. Diagnostic activities

- Review the existing remuneration philosophy, remuneration policy, procedures, practices, forms, templates, delegations and historical decision rules.
- Review current organisation/job architecture, job evaluation and grading arrangements, job families, career streams and the relationship between grades and salary structures.
- Analyse current salary scales, range design, employee distribution within ranges, salary compression/inversion, employees below/above approved ranges and material salary anomalies.
- Review appointment salary practices, promotional increases, progression/notch arrangements, acting appointments, additional duties, allowances, overtime/standby, scarce-skills measures, retention interventions and market-adjustment practices.
- Review the design, cost and administration of employee benefits and recognition programmes.
- Review available turnover, vacancy, offer-acceptance, retention and critical-skills information that may indicate reward-related attraction or retention risks.
- Review reward-related audit findings, exceptions, disputes, grievances, compliance concerns and inconsistent practices where information is available.
- Assess existing HRIS/ESS/payroll data and reporting capability relevant to Total Rewards administration and analytics.
- Conduct structured stakeholder interviews/workshops with identified NRF stakeholders to understand pain points, expectations regarding current rewards, market competitiveness, EVP, Recognition, career opportunities, Benefits, , risks and future-state requirements.
- Assess data completeness and reliability and identify limitations that may affect conclusions or recommendations.

5.2. Phase 2: Benchmarking and Analytics

- The service provider must undertake benchmarking and quantitative analysis sufficient to support evidence-based reward design decisions. The methodology, data sources and limitations must be transparent and reproducible.

- Define and motivate appropriate comparator markets for different workforce segments rather than applying a single generic market.
- Consider, where appropriate, comparable Schedule 3A/public entities, science/research institutions, higher-education institutions, engineering/technology markets, specialist professional markets and other relevant labour markets.
- Assess the organisation's current approach to market benchmarking and reward positioning and identify relevant external trends and practices that should inform the development of the framework.
- Disclose benchmark data sources, survey date, ageing methodology, job-matching methodology, sample characteristics, percentile statistics and limitations.

6. Outputs

- Current-State Diagnostic Report, including an assessment of the NRF's existing remuneration, benefits, incentives, recognition, non-financial rewards, reward governance, processes, controls, key gaps, risks and opportunities.
- Total Rewards Philosophy aligned with the NRF's compensation philosophy and strategic objectives.
- Comprehensive Total Rewards Framework covering financial and non-financial rewards, including recommendations on remuneration structures, salary positioning, progression, performance and reward linkage, employee value proposition and reward governance.
- Remuneration and Benefits Benchmarking Report, including relevant industry, sector and comparator market analysis, benefits benchmarking, value assessment and market positioning recommendations by relevant workforce segment.
- The benchmarking assessment must appropriately consider executive, engineering, technical, developer, scarce and critical skills, and geographical market considerations, where relevant to the NRF.
- Editable Benchmarking Data Book/Analytical Workbook, including methodology, data sources, assumptions, formulas and data dictionary to enable appropriate internal use and maintenance.
- Total Rewards Policy aligned with the approved Total Rewards Framework and applicable legal, regulatory and governance requirements.
- Total Rewards Standard Operating Procedures (SOPs) covering the key processes required for the administration and governance of total rewards.
- Process maps, templates, forms and supporting tools required to operationalise the Total Rewards Policy and SOPs.
- Reward Governance and Control Requirements, including roles and responsibilities, decision rights, approval requirements, delegations, controls, risk considerations and monitoring requirements.

- HRIS, ESS, payroll and data requirements necessary to support the administration, monitoring and reporting of the Total Rewards Framework.
- Implementation and Transition Roadmap, including quick wins and short-, medium- and long-term interventions, priorities, sequencing, dependencies, implementation responsibilities, decision gates, required consultations, system and policy changes, change-management requirements, resource considerations and success measures.
- Final Consolidated Total Rewards Pack, incorporating the approved Total Rewards Philosophy, Framework, Policy, SOPs, benchmarking outputs, governance requirements, supporting tools and implementation roadmap.
- All final deliverables must be provided in PDF and editable source formats, as appropriate. Analytical models, workbooks and supporting tools must be sufficiently documented to enable the NRF to understand, operate, update and maintain them following project close-out.

7. Change Management, Communication, Knowledge Transfer and Implementation

The service provider must develop a practical approach to support the implementation, adoption and sustainability of the Total Rewards Framework, Policy and SOPs. The approach must ensure that the NRF has the required governance arrangements, capabilities, tools and knowledge to administer and maintain the approved reward arrangements following project close-out.

7.1. Implementation Roadmap

The service provider must develop a practical and prioritised implementation roadmap for the approved Total Rewards Framework, Policy and SOPs. The roadmap must distinguish between immediate, medium-term and longer-term interventions and provide a practical basis for implementation, monitoring and ongoing review. The implementation approach must take into account the organisation's operational, financial and human-resource capacity

The roadmap must include, at a minimum:

- Recommended interventions and actions.
- Prioritisation of recommendations
- Key dependencies and resource requirements.
- Implementation phases and indicative timelines.
- Resource and capability requirements.
- Budget and cost considerations.
- Governance and approval requirements.
- Stakeholder and communication requirements.
- Change-management considerations
- Key performance indicators and measures for monitoring implementation and effectiveness.

7.2. Change Management and Stakeholder Engagement

The service provider must develop and implement an appropriate stakeholder engagement and change-management approach to support understanding, adoption and implementation of the proposed Total Rewards Framework.

This must include appropriate engagement and consultation with relevant stakeholders, including, as applicable:

- Executives and senior management.
- People and Culture.
- Finance.
- Legal and Governance.
- Line management.
- Employees.
- Organised labour, where required.

7.3. Communication and Supporting Materials

The service provider must develop appropriate communication materials to support the introduction and ongoing understanding of the Total Rewards Framework, Policy and SOPs.

This must include, as applicable:

- Executive and/or Board-level narrative setting out the case for change, key findings, implications, costs, risks, recommendations and decisions required.
- Employee-facing communication materials.
- Manager guides.
- Frequently Asked Questions (FAQs).
- Presentations and briefing materials.
- Other communication materials required to support implementation.

All communication materials must be clear, consistent and appropriate to the intended audience.

7.4. Capability Building and Knowledge Transfer

The service provider must ensure that the NRF has the capability and knowledge required to govern, administer and maintain the Total Rewards Framework following project close-out.

The service provider must:

- Deliver agreed capability-building and knowledge-transfer workshops for People and Culture and relevant management stakeholders.
- Provide practical knowledge transfer on salary-structure management, remuneration benchmarking, pay-equity analysis, reward decision rules, governance requirements and annual reward-cycle administration.
- Provide editable analytical tools, templates and supporting documentation required for ongoing internal administration and maintenance.
- Explain the methodology, assumptions and application of key analytical models and tools developed during the assignment.

7.5. Handover and Post-Implementation Support

The service provider must provide a structured handover process to ensure continuity following project close-out.

This must include:

- A post-implementation support and handover plan.

- A handover log identifying key deliverables, outstanding actions, responsibilities and recommended follow-up activities.
- Identification of activities requiring ongoing internal ownership.
- Recommendations for periodic review and maintenance of the Total Rewards Framework, Policy, SOPs and supporting tools.
- Agreed post-implementation support, where required and approved by the NRF.

7.6. Deliverable Format and Documentation

All final deliverables must be provided in PDF and editable source formats, as appropriate, including Word, Excel and PowerPoint formats.

All analytical models and tools must be provided in editable format and must include, where applicable:

- Formulas and calculations.
- Assumptions.
- Data sources.
- Data dictionaries.
- Methodology and explanatory notes.
- User instructions.
- Sufficient documentation to enable the NRF to understand, operate, update and maintain the tools internally.

The service provider must ensure that all final deliverables are complete, internally consistent and suitable for use by the NRF following project close-out.

8. Project Duration and Milestones

The proposed contract period is three (3) months from contract commencement. Bidders may propose refinements to sequencing, but the final work plan must cover all six phases and must identify dependencies on NRF data, stakeholder availability and governance decision dates.

Indicative Period	Phase / Milestone
Week 1-2	Phase 1: Inception and Mobilisation - project initiation, confirmation of scope and methodology, stakeholder mapping, detailed work plan, data requirements and project governance arrangements.
Week 3-5	Phase 2: Current-State Diagnostic and Market Benchmarking - review of existing documentation and reward practices, data collection and analysis, remuneration and benefits benchmarking, comparator analysis, stakeholder consultations and identification of key gaps and risks.
Week 6-8	Phase 3: Total Rewards Future-State Design - development of the Total Rewards Philosophy and Framework, including remuneration structures, market positioning, employee value proposition, performance and reward linkage, treatment of relevant workforce segments, governance requirements and supporting recommendations.
Week 9-10	Phase 4: Policy, SOPs and Supporting Tools - development of the Total Rewards Policy, SOPs, process maps, templates, governance controls and supporting analytical/administrative tools, including consideration of HRIS, ESS and payroll requirements.

Week 11-12	Phase 5: Validation, Change Management and Implementation Planning - stakeholder validation, refinement of deliverables, change and communication planning, knowledge-transfer activities and development of the implementation and transition roadmap.
Week 13	Phase 6: Finalisation, Approval and Handover - incorporation of final comments, completion of all deliverables, governance/approval support, final presentations, knowledge transfer, handover and project close-out.

9. Evaluation Criteria

Stage1: Administrative requirements

- Procurement Invitation (SBD 1), signed and completed including the SBD 4, 6.1 and signed Bid Submission Certificate form.
- A valid B-BBEE certificate or Sworn Affidavit
- Pricing (SBD 3.1) in this document to be completed.
- Fully completed Procurement Invitation (SBD 1) including the SBD 4, 6.1 and signed Bid Submission Certificate form.
- Proof of Registration on the Government's Central Supplier Database (CSD).

Stage 2A: Minimum/Mandatory Requirements

Bidders to submit Company profile and organogram/project-team structure reflecting the below roles:

Bidder who fail to meet all the **minimum requirement** in this stage will be eliminated from further evaluation.

Role	Minimum requirement
Project / Total Rewards Lead	Relevant NQF Level 8 or higher qualification in Human Resources, Industrial/Organisational Psychology, Business, Finance or related field; minimum eight (8) years relevant experience with demonstrable senior-level experience Total Rewards, remuneration strategy and/or Total Rewards framework development. The individual must have a recognised SARA qualification/designation relevant to reward and remuneration. Evidence required: • Qualification Certification • CV of the project lead • Proof of SARA designation/qualification
Reward / Remuneration Specialist	Relevant qualification in Human Resources, Industrial/Organisational Psychology, Business, Finance or a related field, with demonstrated experience in remuneration and reward design, salary structures, market benchmarking, pay equity and reward analytics. A recognised SARA qualification/designation is required. Evidence required:

	• Qualification Certification • CV of the project Reward/Remuneration specialist • Proof of SARA designation/qualification
Change Management / HR Specialist	Relevant qualification and demonstrated experience in organisational change, employee engagement, HR transformation and stakeholder management, preferably within complex organisations. Evidence required: • Qualification Certification • CV of the Change management/HR Specialist
HR / Reward Policy and Governance Specialist	Relevant qualification and demonstrated experience in developing HR/reward policies, SOPs, governance frameworks and related documentation, with knowledge of applicable employment and regulatory requirements. Evidence required: • Qualification Certification • CV of the HR/Reward Policy and Governance Specialist • Proof of SARA designation/qualification

NB: The bidder must clearly identify the individuals proposed for each role and provide CVs, qualifications, professional designations and evidence of relevant experience. One individual may fulfil more than one specialist role but not more than two roles where the bidder demonstrates that the individual meets the minimum requirements for each role. Where a SARA qualification/designation is specified as a minimum requirement, the bidder must provide appropriate evidence of the individual's current or valid SARA qualification/designation

Stage 2B: Written technical proposal

Bidders must meet minimum score of **80 points out of 100** to be considered for further evaluation. Bidders that fail to meet the minimum threshold of 80% will be eliminated from further evaluation.

Criterion	Weight	Assessment focus
1. Methodology and technical approach	20	Clear six-phase methodology; diagnostic depth; evidence-based design approach; quality assurance; integration of strategy, governance, analytics and implementation. Submit detailed method statement and project plan aligned to the six project phases.
2. Relevant Total Rewards experience and track record	20	Comparable Total Rewards/remuneration projects, quality of evidence, reference strength and demonstrated outcomes.

		Bidders should provide details of at least three relevant assignments completed within the past [3–5] years, supported by reference letters.
3. Benchmarking, remuneration analytics and data capability	15	Credible market data, job matching, salary-structure analysis, pay equity, benefits analytics and financial modelling capability. Submit Description of benchmark data sources and licences/access arrangements and analytical approach.
4. Proposed team and specialist expertise (Qualifications and experience of proposed team)	15	Quality, relevance, experience and availability of key personnel across Total Rewards, job architecture, benefits, analytics, governance and change. NB: Qualifications and CV submitted to meet minimum requirements will be assessed
5. Understanding of the NRF / regulated organisational context (Relevant organisational experience)	10	Understanding of a Schedule 3A/public entity environment, complex research/scientific workforce, affordability, governance, equity, scarce skills and stakeholder dynamics. Submit reference letter of similar work performed at a schedule 3A/Public entity.
6. Implementation, change and knowledge transfer	10	Practicality of implementation approach, stakeholder engagement, communications, capability building and sustainability after project close. Submit implementation plan and Change, stakeholder-engagement and knowledge-transfer approach.
7. Project plan, resourcing and risk management	10	Realistic timeline, milestones, resource allocation, dependencies, risk controls and delivery discipline. Submit Project plan, inclusive of Ghant Chat and Risk-management and quality-assurance approach

Delivery Address:

NRF Building, South Gate, CSIR Complex, Meiring Naudé Road, Brummeria, Pretoria, 0184.

NOTE: Notwithstanding any other provisions of this Agreement and in addition to the termination rights under the General Conditions of Contract (GCC), the NRF reserves the right to terminate this Agreement, in

whole or in part, for operational reasons. Such reasons may include, but are not limited to, the adoption or implementation of an optimized, nationally sourced facilities management model or strategy aimed at improving efficiency, reducing costs, or aligning with national procurement directives or mandates. In the event of such termination, the NRF shall provide the Service Provider with not less than sixty (60) calendar days' written notice. The Service Provider shall not be entitled to claim any compensation or damages arising from such termination, save for payment due for services satisfactorily rendered up to the effective date of termination. The Service Provider shall take all reasonable steps to ensure an orderly handover and transition, including the provision of relevant documentation, records, and assistance as may be reasonably required by the Purchaser.

SETS OF QUOTATION DOCUMENTS REQUIRED

Number of electronic bid documents for contract signing	1
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RETURNABLE DOCUMENTS CHECKLIST

The bidder is to complete this table and to supply the necessary page references to the supporting documentation. A bidder failing to adequately provide any of the mandatory documents is automatically disqualified.

Legislative/Technical Documents		Compliance		
(M - Mandatory); (O - Optional)	Submitted	Bid Section Reference	Reference to Bidder's document	
Bidder Eligibility				
Procurement Invitation (SBD 1), signed and completed including the SBD 4, 6.1 and signed Bid Submission Certificate form.	M	☐ Yes ☐ No		
A valid B-BBEE certificate or Sworn Affidavit	O	☐ Yes ☐ No		
Pricing Documents		Compliance		
Pricing (SBD 3.1) in this document to be completed.	M	☐ Yes ☐ No		

ELIGIBILITY CRITERIA (GO/NO-GO)

Selection Element	Meet Specification Minimum	Bid Section Reference	Reference to Bidder's document
1 Fully completed Procurement Invitation (SBD 1) including the SBD 4, 6.1 and signed Bid Submission Certificate form.	☐ YES ☐ NO		

Selection Element		Meet Specification Minimum	Bid Section Reference	Reference to Bidder's document
2	Proof of Registration on the Government's Central Supplier Database (CSD).	☐ YES ☐ NO		
3	Company profile and organogram/project-team structure.	☐ YES ☐ NO		
4	Project / Total Rewards Lead- Qualification Certification	☐ YES ☐ NO		
5	Project / Total Rewards Lead- CV	☐ YES ☐ NO		
6	Project / Total Rewards Lead - Proof of SARA designation/qualification	☐ YES ☐ NO		
7	Reward / Remuneration Specialist- Qualification Certification	☐ YES ☐ NO		
8	Reward / Remuneration Specialist - CV	☐ YES ☐ NO		
9	Reward / Remuneration Specialist - Proof of SARA designation/qualification	☐ YES ☐ NO		
10	Change Management / HR Specialist - Qualification Certification	☐ YES ☐ NO		
11	Change Management / HR Specialist- CV	☐ YES ☐ NO		
12	HR / Reward Policy and Governance Specialist – Qualification Certification	☐ YES ☐ NO		
13	HR / Reward Policy and Governance Specialist - CV	☐ YES ☐ NO		
14	HR / Reward Policy and Governance Specialist – Proof of SARA designation/ qualification	☐ YES ☐ NO		
15	Three qualifying reference letters and contact details.	☐ YES ☐ NO		
16	Bidders should provide details of at least three relevant assignments completed within the past [3–5] years	☐ YES ☐ NO		
17	Detailed method statement and project plan aligned to the six project phases.	☐ YES ☐ NO		
18	Description of benchmark data sources and licences/access arrangements	☐ YES ☐ NO		
19	Description of analytical approach	☐ YES ☐ NO		
20	Resourcing plan showing roles, allocation and availability of key personnel	☐ YES ☐ NO		
21	Risk-management and quality-assurance approach.	☐ YES ☐ NO		

Selection Element		Meet Specification Minimum	Bid Section Reference	Reference to Bidder's document
22	Change, stakeholder-engagement and knowledge-transfer approach	☐ YES ☐ NO		
SBD 3.1: PRICING DETAIL				
Pricing Special Conditions				
1	Pricing Schedule: In terms of <u>General Conditions of contract clause 17.1</u> , the price schedule remains unchanged for the duration of the contract with the NRF accepting no changes, extensions, or additional ad hoc costs to the pricing conditions of the contract with the exception of any price adjustments authorised in the Special Conditions of Contract for pricing set out below:			
2	Firm Quantities over the Contract Period: The NRF requires firm set quantities during the current period with the time of delivery being determined during the contract period.			
3	Estimated quantities over the Contract Period: The NRF may require further quantities during the current period with the actual quantity and time of delivery being determined when such quantities are needed. For bidding purposes and to establish the contract ceiling price, the NRF provides estimated quantities of what its requirements and estimated timing during the contract period for bidders to establish their pricing. The NRF does not provide guarantees or commitments that it will order this entire amount during the contract's life. The NRF, through the signed contract, guarantees its procurement of the specified goods and/or services is from the contracted party only.			
4	Placement of written purchase orders for actual quantities ordered: The NRF manages the execution of this contract through the issue of written purchase orders - stipulating quantity, description, delivery date, and the unit price as set out in this contract - for the contracted supplies. The NRF, when issuing the written purchase order, guarantees that the funding is available.			
5	Contract Ceiling Price: With these estimates in the bid contract, the contract ceiling price includes both the firm quantities and the potential future quantities within the contract ceiling price. The NRF manages the contract within the contract ceiling price by paying only for the verified deliveries/performances in terms of the clauses of this contract. The cumulative value of each of these invoices at the expiry of the contract is the actual total contract price.			
6	Price Adjustments: In terms of <u>General Conditions of Contract clause 17.1</u>, the price adjustments with the rules for application are set out below as special conditions of <u>Contract Clause 17.1</u>. Price adjustments and their corresponding rules are for the management of price risks on the basis of the NRF and the contracted bidder sharing the risk equally.			
7	Price quoted is South African Rands in terms of General Conditions of contract clause 16.4			
8	Price Quotation Basis: Price quoted is fully inclusive of all costs including delivery to the specified NRF price delivery point and includes value-added tax, income tax, unemployment insurance fund contributions, and skills development levies in terms of General Conditions of contract clauses 12, 32.1 and 32.2. Price Delivery Point: In cases where different delivery points influence the pricing, the bidder submits a separate pricing schedule for each delivery point.			
9	Detail Pricing Support: Detailed information e.g. costed bill of quantities is optional where not stated in the price schedule below and is provided as an annexure to the details included in this SBD 3			
10	Application of Preference Points: Pricing is subject to the addition of Preference Points as stipulated below - Standard Bidding Document 6.1 Preference claim form.			

SBD 3.1: PRICING DETAIL**PRICING SCHEDULE**

DESCRIPTION/ (Reference to specific specification)	QTY	UNIT OF MEASURE	UNIT PRICE INCLUDING VAT	TOTAL PRICE INCLUSIVE OF VAT
TOTAL CONTRACT VALUE OF ABOVE (CEILING PRICE) INCLUSIVE OF 15% VAT			R	

GENERAL CONDITIONS OF CONTRACT

The National Research Foundation cannot amend the National Treasury's General Conditions of Contract (GCC). The National Research Foundation therefore appends Special Conditions of Contract (SCC) providing specific information relevant to a GCC clause to its the National Treasury's General Conditions of Contract The National Research Foundation has filed its General Conditions of Contract GCC) on its website (<http://www.nrf.ac.za/procurement/General-Conditions-of-Contract>). These form part of this document's contract conditions. Special Conditions specific to this bid contract are set out in this document.

The NRF deems the bidders to have accessed and read the General Conditions of Contract. Whenever there is an unintended conflict, the provisions of the Special Conditions of Contract shall prevail over the General Conditions of Contract.

SPECIAL CONDITIONS OF CONTRACT

(AMENDMENTS TO SPECIFIC CLAUSES OF THE GENERAL CONDITIONS OF CONTRACT LISTED BELOW EACH CLAUSE IN THAT SECTION).

1 Service Provider Obligations:

The service provider must exercise reasonable skill, care and diligence in rendering all services included in this procurement contract.

The service provider must deliver the services during normal working hours (i.e. Monday to Friday, excluding public holidays from 08h30 to 17h00) and/or such additional hours as may be reasonably required by the NRF due to the existence of special circumstances. Services rendered outside of these hours will only be

SPECIAL CONDITIONS OF CONTRACT

rendered by mutual agreement with the nominated person of the NRF, based in severity level.

The service provider may not do anything that may prejudice or be adverse to the operations and functions of the NRF

The service provider must submit such information and reports, as specified in the agreed service request, to the person nominated by the NRF, and comply with all legislation applicable in providing these services.

The service provider corresponds and deliver services only to the NRF and end users of the NRF.

- 2 **Communication:** The contracted parties communicate in writing through mail, delivery, or email. The contracted party states the contract number and purchase order number, if the latter is applicable, on communication documentation. The contract party does not act upon any communication without the contract number or must verify such communication with the assigned NRF contract manager prior to acting upon it.

- 3 **Occupational Health and Safety when working on NRF sites:** All personnel performing work on NRF site/s as part of this contract are responsible to obtain safety induction.

Over and above the obligations provided by the Occupational Health and Safety Act (OHS Act No 85 of 1993 and its Regulations, known as 'the Act'), the contracted party meets with all relevant health and safety instructions as given to them by site safety personnel, where relevant. Personal protection equipment including closed safety shoes, hard hats, height safety equipment, and high visibility vests are worn at all times while on the work site. All personnel are to obey the relevant instructions, including signage, related to restricted access and speed limits on all sites.

The contracted party, once signing the contract (SBD 7), is responsible for itself, its employees, and those people affected by its operations in terms of the Act the regulations promulgated in terms thereof. The contracted party performs all work and uses equipment on site complying with the provisions of the Act.

To this end, the contracted party shall make available to the NRF on the valid Letter of Good Standing in terms of the COID Act and ensures its validity does not expire while executing this bid, where applicable. The contracted party furnishes its registration number with the office of the Compensation Commissioner. The contracted party enters into a Section 37.2 agreement in terms of Occupational Health and Safety Act (OHS Act No 85 of 1993 and its Regulations) that the NRF drafts.

The contracted party maintains a health and safety plan complying with the requirements of The Act at the work site during the period that contracted work takes place on the site.

The NRF manages the contracted party in his capacity for the execution of this contract to meet the provisions of the said Act and the regulations promulgated in terms thereof. The contracted party accepts liability for any contraventions to the Act. Each member of the contracted party's team (including sub-contracted personnel), submit a signed indemnity form prior to entering the work site and kept in the contracted party's health and safety file.

MANAGEMENT OF PERFORMANCE LEVELS

1. The Performance Levels are in the table below.
2. The NRF measures the contracted bidder's performance against these performance levels in the execution of the contract.
3. The contracted bidder recognises that its failure to meet the performance levels has a material and adverse impact on the operations of NRF and that the damages from the contracted bidder's failure to meet any performance level is not susceptible to precise determination.
4. The NRF excuses the contracted bidder from failing to comply with the performance levels to the extent that

MANAGEMENT OF PERFORMANCE LEVELS

non-performance or delayed performance is solely and directly attributable to an act or omission of the NRF or its staff or circumstances of force majeure as referred to in this Agreement.

5. If the contracted bidder fails to meet any performance level:

- the contracted bidder shall investigate and report on the root causes of the performance level failure; promptly correct the failure and begin meeting the set performance levels;
- advise the NRF as and to the extent requested by the NRF of the status of remedial efforts being undertaken with respect to such performance level failure; and
- take appropriate preventative measures to prevent the recurrence of the performance level failure.

6. Both parties are responsible for monitoring and measuring the performance of the contracted bidder against the performance levels set in this document. The NRF deems failure by the contracted bidder to measure performance with respect to the contract specifications for any measurement period, as a failure to meet the stipulated performance levels.

PERFORMANCE LEVELS STATEMENT

Service level	Measurement	Target / expectation	Remedial action
Milestone delivery	Approved project schedule	100% of agreed milestones delivered by approved due date unless formally varied.	Recovery plan, root-cause analysis and revised actions; contractual remedies subject to final SCC.
Deliverable quality	Acceptance criteria and review comments	Deliverables meet scope and acceptance criteria with no material unresolved errors.	Correction/rework at no additional cost for in-scope deficiencies.
Progress reporting	Monthly/fortnightly reporting cadence	Reports submitted by agreed due dates and accurately reflect status, risks and decisions.	Immediate correction and escalation where reporting is materially late/inaccurate.
Responsiveness	Written project communications	Material queries/risks acknowledged within one business day and substantive response within agreed turnaround.	Escalation to project lead and corrective action.
Data confidentiality	NDA, POPIA and NRF security requirements	Zero unauthorised disclosure or unapproved use of NRF data.	Immediate incident response and contractual/legal remedies.
Knowledge transfer	Training/handover plan	All agreed sessions, tools and editable materials completed before close-out.	Close-out not accepted until outstanding transfer obligations are completed.

SBD 4 BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a

controlling interest¹ in the enterprise,
employed by the state?

YES/NO

- 2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of State institution

- 2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the _____ procuring _____ institution?

YES/NO

- 2.2.1 If so, furnish particulars:

.....
.....

- 2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract?

YES/NO

- 2.3.1 If so, furnish particulars:

.....
.....

3 DECLARATION

I, the undersigned, (name)..... in submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

¹ the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.
- 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 CLAIMED (SBD 6.1)

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

² Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

PREFERENCE POINTS CLAIMED (SBD 6.1)

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

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

1. GENERAL CONDITIONS

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

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 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 **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
Total points for Price and SPECIFIC GOALS	100

1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

PREFERENCE POINTS CLAIMED (SBD 6.1)

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

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 PREFERENCE POINT SYSTEMS

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

80/20

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

Ps = Points scored for price of tender under consideration
 Pt = Price of tender under consideration
 Pmin = Price of lowest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

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

Notes to tenderers: The tenderer must indicate how they claim points for each preference point system. The tenderer must submit Proof of B-BBEE Certificate or Sworn Affidavit.

Specific Goals	Number of points allocated (80/20 system)	Number of points claimed (80/20 system) (To be completed by the tenderer)
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PREFERENCE POINTS CLAIMED (SBD 6.1)

B-BBEE Status Level of Contribution 1 to 3	8	
B-BBEE Status Level of Contribution 4 to 6	6	
B-BBEE Status Level of Contribution 7 to 8	2	
Supplier that is at least 51% Black-owned	3	
Supplier that is at least 51% Black female-owned	3	
Supplier that is at least 51% Black youth-owned	1	
Supplier that is at least 51% owned by People with Disabilities	1	
EME or QSE	4	

DECLARATION WITH REGARD TO COMPANY/FIRM

3.2. Name of company/firm.....

3.3. Company registration number:

3.4. 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]

3.5. 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;

PREFERENCE POINTS CLAIMED (SBD 6.1)

- 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:

.....

.....

.....

BID SUBMISSION CERTIFICATE FORM - (SBD 1)

I hereby undertake to supply all or any of the goods, works, and services described in this procurement invitation to the NRF in accordance with the requirements and specifications stipulated in this Bid Invitation document at the price/s quoted.

My offer remains binding upon me and open for acceptance by the NRF during the validity period indicated and calculated from the closing time of Bid Invitation.

The following documents are deemed to form and be read and construed as part of this offer / bid even where integrated in this document:

Invitation to Bid (SBD 1)

Specification(s) set out in this Quotation Invitation inclusive of any annexures thereto

BID SUBMISSION CERTIFICATE FORM - (SBD 1)

Bidder's responses to this invitation as attached to this document	Pricing Schedule(s) (SBD3.1) including detailed schedules attached
(SBD 6.1) PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022	
Declaration of Interest (SBD4)	General Conditions of Contract and special/additional conditions of contract as set out in this document
I confirm that I have satisfied myself as to the correctness and validity of my offer / bid in response to this Bid Invitation; that the price(s) and rate(s) quoted cover all the goods, works and services specified in the Bid Invitation and cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.	
I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me in terms of this Bid Invitation as the principal liable for the due fulfilment of the subsequent contract if awarded to me.	
I declare that I have had no participation in any collusive practices with any Bidder or any other person regarding this or any other Bid.	
I certify that the information furnished in these declarations (SBD 3, SBD 4, SBD 6.1) is correct and I accept that the NRF may reject the Bid or act against me should these declarations prove to be false.	
I confirm that I am duly authorised to sign this offer/ bid response.	
NAME (PRINT)	
CAPACITY	
SIGNATURE	
WITNESS 1	
NAME	
SIGNATURE	
WITNESS 2	
NAME	
SIGNATURE	
DATE	