South African Nursing Council
Regulating nursing, advocating for the public

Enquiries: SCM officials
Quotations2@sanc.co.za

Suppliers Information:

……
……
……
……

Dear Sir/Madam

INVITATION TO QUOTE: REQ NO. REQ0000000893: APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT ACTUARIAL VALUATION, LEGAL COMPLIANCE, AND INDIVIDUAL NEGOTIATIONS FOR THE BUYOUT OF POST-RETIREMENT MEDICAL AID OBLIGATIONS FOR A PERIOD OF TWELVE (12) MONTH

You are requested to complete the RFQ documents and submit them in accordance with the stipulations mentioned hereunder:

1. The conditions contained in the attached annexures apply.
2. The quotation **must be deposited inside the tender box situated at SANC Reception, Cecilia Makiwane Building, 602 Pretorius Street, Arcadia, Pretoria, 0083 before or on the closing date and time on 11 November 2026 at 12H00 South African time.**
3. **The quotation shall be valid for at least 60 days from the closing date of the quotation.**
4. The attached forms/annexures, if completed in full and returned, will form part of your price quotation.
5. Please take note that this price quotation will be evaluated in terms of 80/20 Preference Point System in line with the Preferential Procurement Regulations 2022.
6. With reference to the Preference Point Claim form (SBD 6.1), the following documents must be submitted with your price quotation:

5.1. Proof that the supplier is registered and complying with National Treasury - Central Supplier Database (CSD) requirements (CSD report).

5.2. Proof of Specific goals - Ownership and verification may be conducted in various forms including but not limited to the following documents namely: - CIPC documents, valid copy of B-BBEE certificate, copy of Identity Document, medical report for disability ownership and declaration letter signed by the tenderer. Failure to attach proof, the tenderer will be allocated 0 points on specific goals.

6. All communication should be made using an email. The cut-off date for all enquiries will be at **11H30** on **10 November 2026.**

Cecilia Makiwane Building,
602 Pretorius Street, Arcadia, Pretoria 0083
Private Bag X132, Pretoria 0001,
Republic of South Africa

Tel: 012 420 1000
Fax: 012 343 5400
SANC Fraud Hotline: 0800 377 377

website: www.sanc.co.za

Chairperson: Dr MC Molepo, Vice-Chairperson: Prof DR Phetlhu, Registrar and CEO: Prof NG Mtshali

PART A
INVITATION TO BID

YOU ARE HEREBY INVITED TO QUOTE FOR THE REQUIREMENTS OF THE SOUTH AFRICAN NURSING COUNCIL					
QUOTE NUMBER:	**REQ 00000000000893**	CLOSING DATE:	**11 November 2026**	CLOSING TIME:	**12H00**
DESCRIPTION	**APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT ACTUARIAL VALUATION, LEGAL COMPLIANCE, AND INDIVIDUAL NEGOTIATIONS FOR THE BUYOUT OF POST-RETIREMENT MEDICAL AID OBLIGATIONS FOR A PERIOD OF TWELVE (12) MONTH**				

QUOTING PROCEDURE ENQUIRIES MAY BE DIRECTED TO		TECHNICAL ENQUIRIES MAY BE DIRECTED TO	
CONTACT PERSON	**Supply Chain Management**	CONTACT PERSON	**Mr. Thulani Shabane**
TELEPHONE NUMBER	**012 426 9541**	TELEPHONE NUMBER	**012 426 9508**
E-MAIL ADDRESS	**quotations2@sanc.co.za**	E-MAIL ADDRESS	**tshabane@sanc.co.za**

SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		**OR**	CENTRAL SUPPLIER DATABASE No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] ☐ Yes ☐ No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		[TICK APPLICABLE BOX] ☐ Yes ☐ No

[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]

ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	☐Yes ☐No [IF YES ENCLOSE PROOF]	***ARE YOU A FOREIGN BASED SUPPLIER FOR*** *THE GOODS /SERVICES /WORKS OFFERED?*	☐Yes ☐No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]

QUESTIONNAIRE TO QUOTING FOREIGN SUPPLIERS

IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?	☐ YES ☐ NO
DOES THE ENTITY HAVE A BRANCH IN THE RSA?	☐ YES ☐ NO
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?	☐ YES ☐ NO
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?	☐ YES ☐ NO
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?	☐ YES ☐ NO

IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.

PART B
TERMS AND CONDITIONS FOR BIDDING

1. QUOTE SUBMISSION:

1.1. QUOTES MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE QUOTES WILL NOT BE ACCEPTED FOR CONSIDERATION.

1.2. **ALL QUOTES 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 QUOTE IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.

2. TAX COMPLIANCE REQUIREMENTS

2.1 SUPPLIERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.

2.2 SUPPLIERS 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 SUPPLIERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE QUOTE.

2.5 IN QUOTES WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.

2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE SUPPLIER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.

2.7 NO QUOTES 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 QUOTE INVALID.

SIGNATURE OF BIDDER: ……

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

DATE: ……..

TERMS OF REFERENCE (TOR)

APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT ACTUARIAL VALUATION, LEGAL COMPLIANCE, AND INDIVIDUAL NEGOTIATIONS FOR THE BUYOUT OF POST-RETIREMENT MEDICAL AID OBLIGATIONS FOR A PERIOD OF TWELVE (12) MONTHS.

1. PURPOSE AND BACKGROUND

1.1. **Objective**: To appoint an expert consulting firm (consisting of actuarial, legal, and negotiation specialists) to design, manage, and execute a voluntary buyout program for the Council's Post-Retirement Medical Aid (PRMA) liability.

2. BACKGROUND

2.1. The South African Nursing Council (SANC) currently provides post-retirement medical aid benefits to eligible retired employees (20 main members). This obligation represents a significant unfunded liability and forms part of SANC's annual financial statements.

2.2. The most recent valuation report for the Post-Retirement Medical Aid liability was conducted as at 31 March 2026

2.3. International Accounting Standard IAS 19, *Employee Benefits*, prescribes the accounting and disclosure requirements for post-employment benefit obligations. This includes recognising a defined benefit liability and measuring it according to prescribed actuarial methods.

3. SCOPE OF WORK

The successful service provider will be expected to deliver an end-to-end solution divided into three distinct phases

Phase 1: Actuarial Valuation & Financial Modelling

- **Data Verification**: Review and clean the Council's current PRMA beneficiary database (including ages, dependents, medical aid options, and current subsidy tiers).
- **Liability Valuation**: Perform an updated actuarial valuation of the PRMA liability in accordance with IAS 19 standard.
- **Buyout Pricing Matrix**: Develop an individual pricing matrix offering actuarially justified, financially sustainable, and legally defensible settlement options (e.g., lump-sum cash payouts) tailored to each beneficiary's risk and age profile in consultation with the Council's Chief Financial Officer / Senior Manager Finance.

Phase 2: Legal Framework & Strategy Design

- **Risk Mitigation**: Draft the legal framework, ensuring the strategy fully complies with national employment and pension laws and protects the Council from future liability or litigation.
- **Agreement Drafting**: Formulate robust, , and legally binding individual "Discharge and Settlement Agreements" to be signed by participating former employees.

- **Tax Structuring**: Provide clear guidelines on the tax implications of the buyout for the beneficiaries (including applying for relevant tax directives if necessary).

Phase 3: Stakeholder Engagement & Individual Negotiations

- **Communication Campaign**: Develop clear, plain-language educational materials and hosting collective briefing sessions (working close with unions or bargaining councils if necessary).
- **One-on-One Negotiations**: Conduct sensitive, individual consultations with each former employee (and their financial advisors/families) to explain the voluntary buyout offer, ensuring no coercion occurs.
- **Onboarding & Sign-off**: Facilitate the formal acceptance process, secure signatures on settlement agreements, and hand over the verified payout schedule to the Council's Chief Financial Officer / Senior Manager Finance.

4. KEY DELIVERABLES & TIMELINES

The appointed service provider must deliver:

Deliverable Reference	Expected Output Description	Target Timeline
D1: Inception Report	Project plan, methodology, and stakeholder engagement strategy.	2 weeks from start
D2: Actuarial Model	Comprehensive valuation report and individual pricing/buyout matrices.	6 weeks from start
D3: Legal Toolkits	Drafted settlement agreements, consent forms, and tax clearance templates.	8 weeks from start
D4: Negotiation Phase	Execution of individual consultation rounds and tracking of acceptance rates.	16 weeks from start
D5: Final Close-out	Signed legal agreements, final payout schedules, and close-out report.	20 weeks from start

5. PAYMEN METHOD

5.1. The SANC will not approve invoices for outstanding deliverables, duplicated work, or unproductive time.

5.2. The service provider must submit invoices to the SANC timeously through the agreed channel.

5.3. Each invoice must be valid, original, and supported by the required evidence.

5.4. The SANC may process payment per milestone or for work that has been completed and accepted by the SANC.

6. DESIRED TERMS AND CONDITIONS

6.1. The bidder should strictly treat the SANC's information with the high degree of confidentiality.

6.2. The SANC's information should not be provided by any means to a third party.

6.3. The bidder should provide a total all-inclusive price for this service.

6.4. The bidder should provide reference letters on the referee's letterhead.

7. EVALUATION PROCESS:

7.1. The SANC will evaluate all proposals in terms of the Preferential Procurement Policy Framework Act. No.5 of 2000 (PPPFA) and its regulations. A copy of the PPPFA regulations 2022 can be downloaded from www.treasury.gov.za. In accordance with the PPPFA, submissions will be adjudicated on 80/20 points system and the evaluation criteria. This bid will be evaluated in four (4) phases, namely: administrative compliance, mandatory requirement, functionality and Price & specific goals.

7.1.1. Phase 1: Administrative Compliance:

Document that must be submitted	**Non-compliance with items against which a "YES" is denoted shall result in disqualification**	
Invitation to Bid	**YES**	Complete and sign the supplied pro forma document.
Tax Status	**YES**	Proof of Registration on National Treasury - Central Supplier Database (attach CSD report/ provide the CSD supplier number).
Bidder's Disclosure	**YES**	Complete and sign the supplied pro forma document.
Preference Point Claim Form	**NO**	• Non-submission of Preference Point Claim Form will lead to a zero (0) score on specific goals. • Proof of Specific goals Ownership and verification will be confirmed using the following documents namely: ✓ CIPC documents, ✓ valid copy of B-BBEE certificate, ✓ copy of Identity document, or ✓ medical report for disability ownership **NB: Failure to attach proof, the tenderer will be allocated 0 points on specific goals**

1.1.1. Phase 2: Mandatory Requirements

Document that must be submitted	Non-compliance with items against which a "YES" is denoted shall result in disqualification	
Registration with professional/ regulatory bodies	**YES**	A valid proof of registration with as Registered Service Provider (RSP) with ASSA or other regulatory body **NB: The SANC reserves the right to verify the authenticity of the registration.**
Written price quotation	**YES**	Submit a detailed price quotation as outlined in **clause 3**, scope of work and **4**, deliverables. I do not see the clauses

Phase 3: Any proposed RFQ which does not meet a minimum threshold of **70 points out of 100** points will not be considered further.

The following formula will be used to convert to the points scored against the weight:

$$Ps = \left(\frac{So}{Ms} \right) x100$$

Where:

Ps = Percentage scored for functionality by RFQ under consideration

So = Total score of RFQ under consideration

Ms = Maximum possible score

The following criteria and weights shall apply when considering RFQs:

CRITERIA	SUB-CRITERIA	WEIGHTS
1. SERVICE PROVIDER EXPERIENCE:		
Service providers should demonstrate experience in Actuarial valuations, post-retirement medical aid, legal compliance and individual negotiation • Service provider should have a minimum of 2 years' service in rendering conflict mediation and resolution related interventions. ***Evidence required: Detailed company profile and list of completed projects***	✓ Less than 2 years' relevant experience = **0** points ✓ 2 years' relevant experience = 0**3** points ✓ 3-4 years' relevant experience = **05**points ✓ 5-7 years' relevant experience = **10** points ✓ More than 7 years' relevant experience = **15**points	**15**

KEY PERSONNEL		
Qualifications of an Actuary (attach certified copies of qualifications). **SANC reserves the right to verify the qualification/s provided** **Certified copies not older than 6 months.**	NQF level 9 or more (Actuarial science) = **30 Points** NQF level 8 (Actuarial science) = **20 Points** NQF level 7 (Actuarial Science) = **10 Points** No Qualification attached or irrelevant qualification = **0 Point** Recognized professional body membership (e.g. (ASSA).= **5 points**	**35**
Qualifications for a Business Analyst with Business Management or equivalent (attach certified copies of qualifications). **SANC reserves the right to verify the qualification/s provided** **Certified copies not older than 6 months.**	NQF level 9 or more (see list below) = **15 Points** NQF level 8 (see list below) = **10 Points** NQF level 7 (see list below) = **05 Points** No Qualification attached or irrelevant qualification = **0 Point** Certified Negotiation Expert (**CNE**) registered with Center for Professional Supply Chain Professionals (**CPSCP**) or Certified International Negotiator (**CIN**) registered with Chartered Institute of Professional Certifications = **5 points**	**20**
2. REFERENCE LETTERS		
Track record of providing Actuarial valuations, post-retirement medical aid, legal compliance and individual negotiation A minimum of three (3) references must be provided, and must be on client letterhead, signed, dated and not older than eight (8) years. Contact details must be provided.	✓ Less than 3 relevant reference letters = **0 points** ✓ 3 relevant reference letters = **03 points** ✓ 4 relevant reference letters = **5 points** ✓ 5 relevant reference letters = **8 points**	**10**

SANC reserves the right to contact the references to confirm the information.	✓6 or more reference letters including at least 2 public-sector, professional council or regulated-environment clients = **10 points**	
3. PROPOSAL & PROJECT PLAN		
The service provider must provide a comprehensive methodology demonstrating understanding of the Terms of Reference and proposed approach to diagnosing and resolving workplace conflict. The proposal should include: ▪ Stakeholder engagement approach ▪ Data collection methods ▪ Mediation and facilitation methodology ▪ Risk management measures ▪ Project plan with milestones and timelines ▪ Reporting framework and deliverables ▪ Sustainability and relationship restoration approach	✓ No methodology provided or methodology does not meet requirements = **0 points** ✓ Methodology broadly aligned to deliverables = **05 points** ✓ Methodology aligned to deliverables and demonstrates understanding of the assignment = **10 points** ✓ Detailed methodology demonstrating clear approach, timelines and deliverables = **15 points** ✓ Comprehensive methodology with clear implementation plan, stakeholder engagement strategy, risk mitigation measures, reporting framework and alignment to all TOR requirements = **20 points.**	**20**
TOTAL		**100**

7.1.2. Phase 4. Evaluation on Price and Specific Goals:

7.1.2.1. Price Calculations

The following formula must be used to calculate points out of 80 for price in respect of an invitation for a tender with a rand value from R 2000.00 to or below R50 millions inclusive of all applicable taxes:

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

Where

Ps = Points scored for price of bid under consideration

Pt = Price of bid or offer under consideration

Pmin = Price of lowest acceptable bid or offer.

7.1.2.2. Allocation of Preference Points based on Specific Goals.

The South African Nursing Council tenders will be evaluated on the following specific goals premised on addressing the legacy of apartheid's historical injustices, with a consideration on the following categories (of Historically Disadvantaged People - HDP) using race, gender, youth, and people with disability**.**

A maximum of 20 points may be awarded to a tenderer for the specific goal specified for the tender. The points scored for the specific goal must be added to the points for price and the total must be rounded off to the nearest two decimal places. Subject to section 2(1)(f) of the Act, the contract must be awarded to the tenderer scoring the highest points.

Preferential points will be allocated as per table below:

Specific goal	**80/20 Preference Point system**
Black Ownership	8
Black Women Ownership	4
Black Youth Ownership	4
Disability Ownership	4
Total Points allocated to Specific Goals	**20**

Black Ownership points will be awarded to a Tenderer who has 51% or more black ownership. Black ownership will be determined by the % of the enterprise owned by such a person or by the % of shares owned by members who are actively involved in the day-to-day activities of the company or enterprise.

Preferential points for black ownership will be awarded as follows:

Black Ownership	**80/20 Preference Point system**
Tenderers who have 100% black ownership	8
Tenderers who have 51% to 99% black ownership	5
Tenderers who have less than 51% black ownership	0

Black women ownership points will be awarded to a Tenderer who has 30% or more black women ownership. Black women ownership will be determined by the % of the enterprise owned by such a person or by the % of shares owned by members who are actively involved in the day-to-day activities of the company or enterprise.

Preferential points for black women ownership will be awarded as follows:

Black Women Ownership	**80/20 Preference Point system**
Tenderers who have 100% black women ownership	4
Tenderers who have 30% to 99% black women ownership	2
Tenderers who have less than 30% black women ownership	0

Black youth ownership points will be awarded to a Tenderer who has 30% or more black youth ownership. Black youth ownership will be determined by the % of the enterprise owned by such a person or by the % of shares owned by members who are actively involved in the day-to-day activities of the company or enterprise.

Preferential points for black youth ownership will be awarded as follows:

Black Youth Ownership	80/20 Preference Point system
Tenderers who have 100% black youth ownership	4
Tenderers who have 30% to 99% black youth ownership	2
Tenderers who have less than 30% black youth ownership	0

Disability Ownership points will be awarded to a Tenderer who has 20% or more disability ownership owners. Disability ownership will be determined by the % of the enterprise owned by such a person or by the % of shares owned by members who are actively involved in the day-to-day activities of the company or enterprise.

Preferential points for disability ownership will be awarded as follows:

Disability Ownership	80/20 Preference Point system
Tenderers who have 20% or more owners with disability	4
Tenderers who have less than 20% owners with disability	2
Tenderers who have 0% owners with disability	0

NB – The SANC will verify the Tax status outcome on the CSD report/ SARS e-Filling report:

i. A bidder whose tax status is non-compliant will be notified of their tax matters and must meet their outstanding tax obligations within seven (7) days.
ii. Should the bidder fail to provide a written proof of their tax compliance status within Seven (7) days, the SANC will reject the bid submitted by the bidder.

PRICING SCHEDULE

Deliverable Reference	Expected Output Description	Total Price (VAT exclusive)
D1: Inception Report	Project plan, methodology, and stakeholder engagement strategy.	R
D2: Actuarial Model	Comprehensive valuation report and individual pricing/buyout matrices.	R
D3: Legal Toolkits	Drafted settlement agreements, consent forms, and tax clearance templates.	R

D4: Negotiation Phase	Execution of individual consultation rounds and tracking of acceptance rates.	R
D5: Final Close-out	Signed legal agreements, final payout schedules, and close-out report.	R
TOTAL		**R**
VAT		**R**
GRAND TOTAL		**R**

Required by (End-User):

Required at (Address):

Brand and model (if applicable):

Country of origin (if applicable): ……

Guarantee period (if applicable): ……..

Does the offer comply with the specification? ☐ Yes ☐ No ☐
***Mark the relevant block with an X**

If not to specification, indicate deviation(s) ……..

How long it will take for the bidder to deliver goods/services after receipt of a purchase order? (Only firm delivery period will be considered): ……

DECLARATION BY THE BIDDER:

I …… confirm that the information furnished is correct and true. I accept that the South African Nursing Council may act against me should this declaration prove to be false.

Name of Bidder: ……Position: ……

Signature: ……..Date: ……

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

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

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

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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 000 000.00 (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.

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

(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

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

Where:

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

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 points is allocated for price on the following basis:

80/20

$$Ps = 80\left(1 + \frac{Pt - P\,max}{P\,max}\right)$$

Where:

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmax = 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 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 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 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 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 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	Description of the goals	Number of points allocated (80/20 system)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Black Ownership	Tenderers who have 100% black ownership	**8**	
	Tenderers who have 51% to 99% black ownership	**5**	
	Tenderers who have less than 51% black ownership	**0**	
Black Women Ownership	Tenderers who have 100% black women ownership	**4**	
	Tenderers who have 30% to 99% black women ownership	**2**	
	Tenderers who have less than 30% black women ownership	**0**	
Black Youth Ownership	Tenderers who have 100% black youth ownership	**4**	
	Tenderers who have 30% to 99% black youth ownership	**2**	
	Tenderers who have less than 30% black youth ownership	**0**	
Disability Ownership	Tenderers who have 20% or more owners with disability	**4**	
	Tenderers who have less than 20% owners with disability	**2**	
	Tenderers who have 0% owners with disability	**0**	

5. DECLARATION WITH REGARD TO COMPANY/FIRM

51. Name of company/firm…….
52. Company registration number: ……..
53. 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]

5.4 I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

i) The information furnished is true and correct.

ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form.

iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct.

iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –

(a) disqualify the person from the tendering process.

(b) recover costs, losses, or damages it has incurred or suffered as a result of that person's conduct.

(c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation.

(d) recommend that the tenderer or contractor, its shareholders, and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and

(e) forward the matter for criminal prosecution, if deemed necessary.

……

SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME: ……

DATE: ……

ADDRESS: ……

……

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:

……

……

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 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 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

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.