RFQ NUMBER	**RFP-HO-10-2026- ACTUARIAL VALUATION**
DESCRIPTION	APPOINTMENT OF A SUITABLY QUALIFIED ACTUARIAL FIRM TO PERFORM AN ACTUARIAL VALUATION OF THE SOUTH AFRICAN HUMAN RIGHTS COMMISSION LONG SERVICE AWARD (KRUGER COIN) OBLIGATION IN TERMS OF GRAP 25
PUBLISHED	**DATE: 03 November 2026**
RFQ BRIEFING	Not applicable
CLOSING DATE	**DATE: 13 Nov 2026** TIME: 11H00 (GMT +2) ADDRESS: South African Human Rights Commission Supply Chain Management 32 Princess of Wales Terrace ss Sunnyside Office Park Parktown Submissions to be done via email to: **HOprocurement@sahrc.org.za**

1. INTRODUCTION AND BACKGROUND

The South African Human Rights Commission (SAHRC) seeks to appoint a suitably qualified and experienced actuarial firm, whose valuation is signed by a Fellow of the Actuarial Society of South Africa, to perform an actuarial valuation of its Long Service Award obligation, which is settled in the form of Kruger coins, in accordance with GRAP 25: Employee Benefits. The appointment is intended to address the Auditor-General South Africa audit finding on the valuation of this obligation and to ensure that the Commission recognises, measures and discloses the Long Service Award liability, together with any related prior period error, in accordance with GRAP 25 and GRAP 3: Accounting Policies, Changes in Accounting Estimates and Errors.

2. PURPOSE OF THE ASSIGNMENT

The purpose of this assignment is to appoint an independent actuarial firm to determine the Commission's Long Service Award obligation, to prepare the actuarial valuations required for the Annual Financial Statements and for the restatement of comparative information where a prior period error is confirmed, and to provide actuarial support during the external audit process.

3. NATURE OF THE LONG SERVICE AWARD BENEFIT

The Commission awards employees a Long Service Award in the form of a Kruger coin upon the attainment of the qualifying years of service prescribed in its Employee Handbook Policy. As the benefit is delivered in kind and its cost depends on the prevailing price of the coin, the obligation is exposed to movements in the gold price and the Rand exchange rate, in addition to the demographic and financial assumptions ordinarily applied to long service awards. The Commission will confirm the following parameters at the inception meeting:

- Qualifying service milestones: 5 years milestone interval
- Coin specification and quantity per milestone: (Quarter, Half and Full Kruger coin)
- Source of the coins and the basis on which the cost per coin is determined, including VAT: Through procurement of the Kruger Coins from SA Mint
- Effective date of the policy and any amendments: 2017.

4. OBJECTIVES

The successful bidder will be required to:

- Determine the present value of the Long Service Award obligation as of 31 March 2026 (Part A) and as at 31 March 2027 (Part B) and, where required for the restatement of the opening balance, as at 31 March 2025 (The valuation to be performed in two stages, first in the third quarter of the financial year, which only the prior period error and the comparative would be determined and thereafter, after year end, the closing balance would be determine for classification and disclosure purposes.
- Apply the projected unit credit method and actuarial assumptions in accordance with GRAP 25.
- Establish and justify a basis for valuing the Kruger coin benefit, including the coin price at each valuation date and the assumed rate of escalation.
- Calculate the current service cost, interest cost, remeasurements and movement in the liability, together with the reconciliation of the opening and closing balances.

- Quantify any prior period error in a form that enables the Commission to restate comparative information in accordance with GRAP 3.
- Prepare GRAP 25 disclosure information and supporting accounting schedules.
- Provide technical support during the external audit.

5. SCOPE OF WORK

The appointed actuarial firm shall perform the following services, and any service beyond this scope shall require the prior written approval of the Chief Financial Officer or delegated official before it commences.

Review and Validation

- Review and validate employee information supplied by the Commission, including dates of birth, dates of appointment, continuous service and any recognised prior service.
- Verify qualifying years of service, employee eligibility and the next award milestone of each employee.
- Reconcile the number of awards and coins issued in previous years to the records of the Commission.
- Identify and communicate in writing any data anomalies requiring correction.

Review of Employee Benefits

- Review the Commission's Employee Handbook and applicable employee benefit provisions.
- Confirm the nature of the benefits to be valued, including the in-kind Kruger coin award, and their classification as another long-term employee benefit in terms of GRAP 25.

Actuarial Valuation

- Develop and document appropriate actuarial assumptions, including the discount rate, coin price and its escalation, mortality, withdrawal, ill-health and retirement, with a justification for each assumption.
- Calculate the Long Service Award liability as at each valuation date and determine the present value of the obligation.
- Calculate current service cost, interest cost, remeasurements and the reconciliation of the liability.
- Perform sensitivity analyses on the discount rate, the coin price escalation and withdrawal rates.

Annual Financial Statement Support

- Prepare a detailed actuarial valuation report.
- Prepare GRAP 25 disclosure schedules.
- Prepare accounting journals and supporting working papers, and a schedule supporting the restatement of comparative information where a prior period error is confirmed.

Audit Support

- Respond to actuarial queries raised by the Auditor-General.
- Revise the valuation where material audit adjustments are required.
- Present the valuation results to management and, on request, to the Audit Committee.

- Remain available for audit queries until the completion of the audit of the 2026/27 Annual Financial Statements.

6. INFORMATION TO BE PROVIDED BY THE COMMISSION

The Commission shall provide the following within five (5) working days of the inception meeting, and the appointed firm shall confirm in writing whether the data received is sufficient and report any shortfall without delay:

- An extract of employee data, including employee number, date of birth, date of appointment and service history.
- The Employee Handbook Policy and all amendments thereto.
- A schedule of awards issued per financial year, with the quantity of coins and the cost per coin.
- The prior year Auditor General South Africa audit finding on the valuation.
- The contact details of the responsible officials in Finance and Human Resources.

7. DELIVERABLES AND TIMEFRAMES

The Commission targets the appointment of the successful bidder during the third quarter of the 2026/27 financial year, and the assignment shall commence immediately upon appointment. The deliverables below shall be submitted within the stated timeframes, which are measured from the date of the letter of appointment unless otherwise indicated.

No	Deliverable	Timeframe
1	Inception meeting and confirmation of data requirements	Within 3 working days
2	Validated employee database and data anomaly report	Within 10 working days
3	Documented actuarial assumptions, including the coin price basis, for approval by the Commission	Within 12 working days
4	Draft actuarial valuation report as at 31 March 2026 (Part A)	Within 20 working days
5	Final signed actuarial valuation report, executive summary, GRAP 25 disclosure schedules, accounting journals, supporting actuarial working papers and management presentation (Part A)	Within 25 working days
6	Final signed valuation as at 31 March 2027, with disclosure schedules and journals (Part B)	On or before (31 December 2026 and 30 April 2026)
7	Responses to Auditor General South Africa queries	Within 3 working days of receipt, until completion of the 2026/27 audit

8. REQUIREMENTS FOR THE ACTUARIAL SERVICE PROVIDER

The bidder must satisfy the following mandatory requirements, and failure to demonstrate any of them will result in the disqualification of the quotation:

- The valuation must be performed and signed by a Fellow of the Actuarial Society of South Africa (FASSA) who is a member in good standing, supported by proof of membership.
- The lead actuary must have at least five (10) years' post-qualification experience in the valuation of employee benefits in terms of GRAP 25 or IAS 19, supported by a curriculum vitae.

- The firm must have completed at least three (3) employee benefit valuations in terms of GRAP 25 or IAS 19 for organs of state, public entities or municipalities in the last five (5) years, supported by signed reference letters stating the scope and value of each assignment.
- The firm must be registered on the Central Supplier Database with a valid tax compliance status.
- The firm must submit a signed declaration of any current or recent services provided to the Commission and of any relationship with the Auditor-General South Africa engagement team that could give rise to a conflict of interest.

Desirable Requirements

- Experience in valuing benefits that are settled in kind or linked to commodity or asset prices.
- An internal peer review of the valuation by a second Fellow of the Actuarial Society of South Africa.
- Demonstrated capacity to support the audit within the timeframes of the Auditor-General South Africa.

9. INDEPENDENCE, CONFIDENTIALITY AND ETHICS

- The supplier must act independently, impartially and objectively, and the opinions expressed shall be the professional judgement of the signing actuary.
- All information collected will be treated as strictly confidential and used solely for the purposes of the said service, and the appointed service provider will hold all material and information produced during the assignment in the strictest confidence and take all steps necessary to prevent its dissemination to any third party without the prior written agreement of the SAHRC.
- The successful bidder shall maintain strict confidentiality over all employee information and Commission records, shall comply with the Protection of Personal Information Act, 2013 as an operator, shall store and transfer employee data securely, and shall return or securely destroy that data on completion of the assignment as directed by the Commission.
- The supplier must adhere to the Code of Professional Conduct and the professional standards of the Actuarial Society of South Africa, avoid conflicts of interest, ensure fairness and disclose any actual or potential conflict to the Commission in writing without delay.

10. REPORTING AND ACCOUNTABILITY

The successful service provider shall report directly to the Chief Financial Officer or delegated official (Finance Manager), shall report progress on the achievement of each deliverable, and shall report any risk to the timeframes in writing immediately. All reports, calculations and supporting documentation produced during the assignment shall become the property of the Commission.

11. FEES AND PAYMENT TERMS

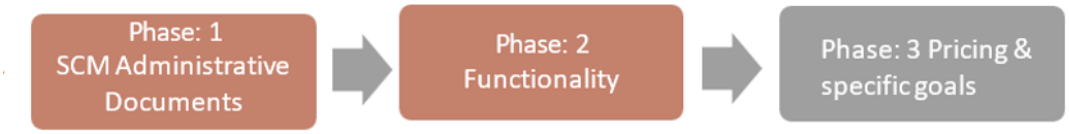
- Quotations shall be submitted as a fixed, all-inclusive fee, inclusive of VAT, travelling, subsistence and all disbursements, using the Annexure A pricing schedule, which shall state separate fees for Part A, Part B and audit support.
- Annexure A shall further state an hourly rate per grade of staff for additional services, which shall apply only where the Commission has approved the additional services in writing before the work commences.
- Payment shall be made against approved deliverables within thirty (30) days of receipt of a valid tax invoice and acceptance of the relevant deliverable by the Commission, subject to the approved contract value.
- Quoted prices shall remain valid for at least sixty days from the closing date and shall not be subject to escalation.

12. ACCEPTANCE OF TERMS AND CONTRACTING

- The appointment is subject to the Supply Chain Management Policy of the Commission and to the outcome of the procurement process, and the Commission reserves the right not to make an award.
- The successful bidder shall receive a letter of appointment and shall conclude a service level agreement that incorporates these Terms of Reference.
- Where the service provider fails to deliver within the stated timeframes or to the required standard, the Commission may, after written notice and a remedy period of five (5) working days, cancel the appointment, appoint an alternative provider and recover any resulting damages.
- The appointment shall terminate on completion of the audit support for the 2026/27 financial year, and any extension shall comply with the Supply Chain Management Policy of the Commission.

13. EVALUATION CRITERIA

Quotations will be evaluated in three phases, namely administrative compliance and responsiveness (Phase 1), functionality (Phase 2) and price and specific goals (Phase 3), and will be adjudicated on the 80/20 preference point system in terms of the Preferential Procurement Regulations, 2022 issued under the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).



Phase 1: Administrative compliance and responsiveness

- Annexure A pricing schedule, fully completed and submitted as a separate attachment.
- Standard bidding document SBD 4 (Bidder's Disclosure).
- Standard bidding document SBD 6.1 (Preference Points Claim Form).
- Central Supplier Database report reflecting active registration and tax compliance status.
- B-BBEE certificate or sworn affidavit, where preference points for specific goals are claimed.
- The documents evidencing the mandatory requirements in the section on requirements for the actuarial service provider, namely proof of membership of the Actuarial Society of South Africa, curriculum vitae of the key personnel and reference letters

The South African Human Rights Commission (SAHRC) reserves the right, where an administrative document contains an error, omission, or defect of a minor or clerical nature, to contact the service provider and afford it an opportunity to rectify or clarify the defect. Such rectification must be submitted within a period not exceeding three (7) working days from the closing date of the Request for Quotation (RFQ) and will form part of the original quotation submission.

This provision applies only to minor administrative defects that do not materially affect the substance of the bid or compromise the principles of fairness, transparency, competitiveness, or equal treatment of bidders. Under no circumstances shall this provision apply to the price quotation, pricing schedules, or any amendment that would result in a material alteration of the bid after the closing date.

With regard to the SBD 6.1 – Preference Points Claim Form, the SAHRC reserves the right to allocate points for specific goals based on the objective evidence submitted by the service provider and not solely on the points claimed in the declaration. Where a service provider claims points for specific goals without submitting sufficient supporting evidence, or where the supporting documentation demonstrates entitlement to points different from those claimed, the SAHRC shall allocate points based on the evidence that was valid and submitted by the closing date of the RFQ.

Broad-Based Black Economic Empowerment (B-BBEE) Certificates or Sworn Affidavits containing errors, omissions, or inaccuracies in the claiming of ownership or specific goal points, including instances where a service provider failed to claim points for qualifying ownership categories, will not be permitted to be amended or rectified after the closing date of the RFQ. As B-BBEE Affidavits are deposed to under oath and certificates are issued as formal verification documents, the SAHRC shall allocate points strictly in accordance with the information reflected on the valid B-BBEE Certificate or Sworn Affidavit as at the closing date of the RFQ.

Furthermore, B-BBEE Certificates or Sworn Affidavits that have expired prior to the closing date of the RFQ shall not be considered for the allocation of points for specific goals. The responsibility rests solely with the service provider to ensure that all supporting documents, including B-BBEE Certificates and Sworn Affidavits, are valid and submitted by the closing date of the RFQ.

Phase 2: Functionality evaluation

Quotations that are administratively compliant will be evaluated on functionality out of a maximum of 100 points, and only quotations that score at least 70 points will proceed to Phase 3. Functionality operates as a minimum threshold for responsiveness, and no functionality points are carried into the 80/20 calculation.

Criterion	Evidence and scoring	Points
Experience of the firm	Number of GRAP 25 or IAS 19 employee benefit valuations for organs of state, public entities or municipalities in the last 5 years, verified through reference letters: less than 3 valuations=0; 3 valuations = 10; 4 to 6 valuations = 20; 7 or more valuations = 30	30
Experience of the lead actuary	Experience in employee, verified through team lead CV, less than 5 years= 0 benefit valuations: 5 to 6 years = 15; 7 to 9 years = 20; 10 or more years = 25	25
Methodology and approach Report	Approach to data validation, assumption setting and the valuation of the Kruger coin benefit, including the coin price basis, escalation and sensitivity analysis: poor = 0 to 8; adequate = 9 to 17; strong = 18 to 25	25
Project plan and capacity Report	Work plan aligned to the timeframes, team structure, peer review and availability for audit support: poor = 0 to 3; adequate = 4 to 7; strong = 8 to 10	10
FASSA Membership	No FASSA valid membership= 0; FASSA Valid Membership= 10	10
Total	**Minimum threshold to proceed to Phase 3: 70 points**	**100**

Phase 3: Price and Specific Goals evaluation

In terms of regulation 4 of the Preferential Procurement Regulations pertaining to the Preferential Procurement Policy Framework Act, 2000 (Act 5 of 2000), responsive quotations with proposals will be adjudicated on the 80/20-preference point system in terms of which points are awarded to bidders based on:

- The bid price (maximum 80 points)
- Specific Goals (maximum 20 points)

Stage 1 – Price Evaluation (80 Points)

Criteria	Points
Price Evaluation $Ps = 80\left(1 - \frac{Pt - P\min}{P\min}\right)$	80

The following formula will be used to calculate the points for price:

Where
- Ps = Points scored for comparative price of bid or offer under consideration.
- Pt = Comparative price of bid or offer under consideration.
- P min = Comparative price of the lowest acceptable bid or offer

- Points must be awarded to a bidder for attaining the specific status level of contribution per the table below.

Specific goals allocation

A maximum of 20 points may be allocated to a bidder for attaining their specific goals status level of contributor per the table below:

SPECIFIC GOALS	POINTS
Suppliers with ownership of 51% or more by person/s who are black person/s	10
Suppliers with ownership of 51% or more by person/s who are black women	5
Suppliers with ownership of 51% or more by person/s who are black youth	3
Suppliers with ownership of 51% or more by person/s with disability	2

Specific goal points may be allocated to bidders on submission of the following documentation or evidence

- A duly completed Preference Point Claim Form: Standard Bidding Document (SBD 6.1); and evidence on how points are claimed.
- maximum of 20 points may be allocated to a bidder for attaining their specific goals. Points claimed as per the SBD 6.1 shall be verified using the Central Supplier Database Report (CSD) and/or valid B-BBEE certificate/affidavit.

14. SUBMISSION, ENQUIRIES AND CLOSING DATE

- Quotations must be submitted on or before 13 November 2026 at 11h00 (GMT +2), and late submissions will not be considered.
- All documentation must be emailed to HOprocurement@sahrc.org.za, using the RFQ number and the title of the assignment in the subject line.
- The Annexure A pricing schedule must be saved and attached separately from the documents evidencing functionality, to enable the evaluation of functionality before the pricing is considered.
- Enquiries must be directed to HOprocurement@sahrc.org.za at least three (3) working days before the closing date, and the response to each enquiry will be issued to all bidders.

SBD1

PART A
INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE SOUTH AFRICAN HUMAN RIGHTS COMMISSION					
BID NUMBER:	**RFP-HO-10-2026**	CLOSING DATE:	**13 November 2026**	CLOSING TIME:	**11:00**
DESCRIPTION	**Appointment of a suitably qualified actuarial firm to perform an actuarial valuation of The South African Human Rights Commission long service award (Kruger Coin) Obligation in terms of GRAP 25**				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT *(STREET ADDRESS)*					
HOprocurement@sahrc.org.za					

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO		TECHNICAL ENQUIRIES MAY BE DIRECTED TO:	
CONTACT PERSON	**Tender office**	CONTACT PERSON	**Patrick Maluleke**
TELEPHONE NUMBER	**011 877 3600**	TELEPHONE NUMBER	**011 877 3600**
FACSIMILE NUMBER		FACSIMILE NUMBER	
E-MAIL ADDRESS	**HOprocurement@sahrc.org.za**	E-MAIL ADDRESS	HOprocurement@sahrc.org.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
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	☐Yes ☐No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES 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.

PART B
TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:

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

1.2. **ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED (NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.**

1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.

1.4. **THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).**

2. TAX COMPLIANCE REQUIREMENTS

2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.

2.2 BIDDERS 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 PIN 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."

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: ……

SBD 3.1

PRICING SCHEDULE – FIRM PRICES (PURCHASES)

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

IN CASES WHERE DIFFERENT DELIVERY POINTS INFLUENCE THE PRICING, A SEPARATE PRICING SCHEDULE MUST BE SUBMITTED FOR EACH DELIVERY POINT

Name of bidder……	Bid number……....
Closing Time 11:00	Closing date……...

OFFER TO BE VALID FOR……DAYS FROM THE CLOSING DATE OF BID.

ITEM NO.	QUANTITY	DESCRIPTION	BID PRICE IN RSA CURRENCY ** (ALL APPLICABLE TAXES INCLUDED)

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

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

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

*Delete if not applicable

BIDDER'S DISCLOSURE

SBD 4

1. PURPOSE OF THE FORM

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

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

2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest[1] 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

[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.

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

2.2.1 If so, furnish particulars:

……

……

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

2.3.1 If so, furnish particulars:
…….

…….

3 DECLARATION

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

3.1 I have read and I understand the contents of this disclosure;

3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;

3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium[2] 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.

[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.

3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

…… ……

Signature Date

…… ……

Position Name of bidder

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

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 (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**

(*delete whichever is not applicable for this tender*)..

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 OR 90/10 PREFERENCE POINT SYSTEMS

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

80/20 **or** **90/10**

$$Ps = 80\left(1 - \frac{Pt - Pmin}{Pmin}\right) \text{ or } Ps = 90\left(1 - \frac{Pt - Pmin}{Pmin}\right)$$

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 or 90 points is allocated for price on the following basis:

80/20 **or** **90/10**

$$Ps = 80\left(1 + \frac{Pt - Pmax}{Pmax}\right) \text{ or } Ps = 90\left(1 + \frac{Pt - Pmax}{Pmax}\right)$$

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 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of

(a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or

(b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,

then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

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

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

Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)

The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Suppliers with ownership of 51% or more by person/s who are black person/s		10		
Suppliers with ownership of 51% or more by person/s who are black women		5		
Suppliers with ownership of 51% or more by person/s who are black youth		3		
Suppliers with ownership of 51% or more by person/s with disability		2		

DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name of company/firm……..

4.4. Company registration number: ……....

4.5. TYPE OF COMPANY/ FIRM

□ Partnership/Joint Venture / Consortium □ One-person business/sole propriety
□ Close corporation □ Public Company
□ Personal Liability Company □ (Pty) Limited
□ Non-Profit Company
□ State Owned Company
[TICK APPLICABLE BOX]

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

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;

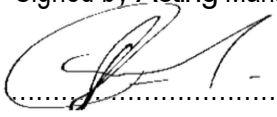
(c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;

(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.

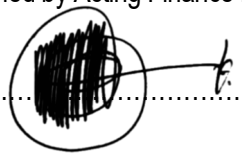
	……..
	SIGNATURE(S) OF TENDERER(S)……..
	……
	……
SURNAME AND NAME:	……
DATE:	……
ADDRESS:	……

Signed by Acting Manager SCM



……..

Signed by Acting Finance Manager



……