KWAZULU-NATAL PROVINCE
ECONOMIC DEVELOPMENT, TOURISM AND ENVIRONMENTAL AFFAIRS
REPUBLIC OF SOUTH AFRICA

Invitation to Tender – ZNT 05 EDTEA 26-27

KwaZulu-Natal *Department of Economic Development, Tourism and Environmental Affairs*

Suitable and capable service providers are invited to bid for: **APPOINTMENT OF A SUITABLY QUALIFIED SERVICE PROVIDER TO CONDUCT OPT-OUT REGISTRY AND DEBT COUNSELLING WORKSHOPS FOR OVER-INDEBTED CONSUMERS, ON CONSUMER EDUCATION AND AWARENESS IN 11 DISTRICTS OF KWAZULU-NATAL ON BEHALF OF THE KWAZULU-NATAL CONSUMER PROTECTOR FOR THE DEPARTMENT OF ECONOMIC DEVELOPMENT, TOURISM AND ENVIRONMENTAL AFFAIRS OVER A PERIOD OF 36 MONTHS.**

Collection of Bid Documents
Bid documents can be downloaded from www.etenders.gov.za /www.kznedtea.gov.za

COMPULSORY Briefing Session *(APPLICABLE)*

Venue:	Date:	Time:
141 BOARDROOM 270 JABU NDLOVU STREET, PMB	16/11/2026	10H00

Queries relating to the issue of these documents may be addressed to SCM Office
Tel. No. (033) 264 2731/ 2864:
E-mail: bids@kznedtea.gov.za

Closing Date: 08/12/2026
The closing time for receipt of Tenders is 11h00.
Telegraphic, telephonic, telex, facsimile, e-mail and late Tender Proposals will not be accepted.

N.B. Bidders are hereby advised that, upon submission of bids or quotations, they will be required to sign the official submission register at the reception. It is the responsibility of each bidder to ensure timely arrival to complete this process without delay.

N.B Bidders must ensure that their appointed couriers or drivers are fully informed of the submission requirements and procedures outlined herein, including the obligation to sign the official submission register upon delivery.

Initials: _____

KWAZULU-NATAL PROVINCIAL GOVERNMENT BIDDING FORMS
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Initials: _____

PART A: INVITATION TO BID **SBD1**

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (*NAME OF DEPARTMENT/ PUBLIC ENTITY*)					
BID NUMBER:	**ZNT 05 EDTEA 26-27**	CLOSING DATE:	**08/12/2026**	CLOSING TIME:	**11H00 AM**
DESCRIPTION	**APPOINTMENT OF A SUITABLY QUALIFIED SERVICE PROVIDER TO CONDUCT OPT-OUT REGISTRY AND DEBT COUNSELLING WORKSHOPS FOR OVER-INDEBTED CONSUMERS, ON CONSUMER EDUCATION AND AWARENESS IN 11 DISTRICTS OF KWAZULU-NATAL ON BEHALF OF THE KWAZULU-NATAL CONSUMER PROTECTOR FOR THE DEPARTMENT OF ECONOMIC DEVELOPMENT, TOURISM AND ENVIRONMENTAL AFFAIRS OVER A PERIOD OF 36 MONTHS.**				

BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT *(STREET ADDRESS)*
270 JABU NDLOVU STREET
PIETERMARITZBURG
3201

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO		**TECHNICAL ENQUIRIES MAY BE DIRECTED TO:**	
CONTACT PERSON	**SCM Office**	CONTACT PERSON	**Tshepiso Selepe**
TELEPHONE NUMBER	**033 264 2731 /2864**	TELEPHONE NUMBER	**079 505 2402**
FACSIMILE NUMBER		FACSIMILE NUMBER	
E-MAIL ADDRESS	**bids@kznedtea.gov.za**	E-MAIL ADDRESS	**Tshepiso.Selepe@kznedtea.gov.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.

Initials: _____

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: ……

Initials: _____

SECTION B: LIST OF ALL RETURNABLE & COMPULSORY DOCUMENTS

The bidder shall complete and submit the following returnable schedules and documents:

Section/ Schedule	Description	Compulsory (Yes / No)	Non-Submission will render bidders non-responsive (Yes/No)	Compulsory (Yes / No) For BID Evaluation Purposes	Yes	No	N/A
Prospective Service Providers MUST complete the following as per the BID document:							
Part A	**Invitation to BID**	**Yes**	**Yes**	**Yes**			
Part B	**Terms and Conditions for bidding (SBD 1)**	**Yes**	**Yes**	**Yes**			
Section C	Special Instructions regarding completion of bid	**Read only**					
Section D	Registration on Central Suppliers Database	**Read Only**					
Section E	Declaration that information on Central Suppliers database is correct and up to date	**Yes**	**Yes**	**Yes**			
Section F	Pricing Schedule (SBD 3.1)	**Yes**	**Yes**	**Yes**			
Section G	Pricing schedule (SBD 3.3) (Professional services)	**Yes**	**Yes**	**Yes**			
Section H	Bid Offer	**Yes**	**Yes**	**Yes**			
Section I	Bidder's disclosure form (SBD4)	**Yes**	**Yes**	**Yes**			
Section J	Preference Points Claim Form In terms of the Preferential Procurement Regulations 2022	**Yes**	**No**	**Yes**			
Section K	**Questionnaire Replies -** To be only included when BIDs for goods are involved.	**Yes**	**Yes**	**Yes**			
Section L	Official Briefing session form	**Yes**	**Yes**	**Yes**			
Section M	Special Conditions of Contract	**Yes**	**Yes**	**Yes**			
Section N	General Conditions of Contract	**Read only**					
Section O	**Authority to Sign a BID**	**Yes**	**Yes**	**Yes**			
Section P	Schedule variations from good and services information			**Yes If applicable**			

Initials: _____

Section/ Schedule	Description	Compulsory (Yes / No)	Non-Submission will render bidders non-responsive (Yes/No)	Compulsory (Yes / No) For BID Evaluation Purposes	Yes	No	N/A
Annexure A	Terms of Reference	**Yes**	**Yes**	**Yes**			
Annexure B	Evaluation Grid	**Yes**	**Yes**	**Yes**			
Annexure C	CV Format	**Yes**	**Yes**	**Yes**			
Annexure D	Statement of exclusivity and availability	**Yes**	**Yes**	**Yes**			

Initials: _____

SECTION C: SPECIAL INSTRUCTIONS AND NOTICES TO BIDDERS REGARDING THE COMPLETION OF BIDDING FORMS

PLEASE NOTE THAT THIS BID IS SUBJECT TO TREASURY REGULATIONS 16A ISSUED IN TERMS OF THE PUBLIC FINANCE MANAGEMENT ACT, 1999, THE KWAZULU-NATAL SUPPLY CHAIN MANAGEMENT POLICY FRAMEWORK.

1. Unless inconsistent with or expressly indicated otherwise by the context, the singular shall include the plural and visa versa and with words importing the masculine gender shall include the feminine and the neuter.
2. Under no circumstances whatsoever may the bid forms be retyped or redrafted. Photocopies of the original bid documentation may be used, but an original signature must appear on such photocopies.
3. The bidder is advised to check the number of pages and to satisfy himself that none are missing or duplicated.
4. Bids submitted must be complete in all respects.
5. Bids shall be lodged at the address indicated not later than the closing time specified for their receipt, and in accordance with the directives in the bid documents.
6. Each bid shall be addressed in accordance with the directives in the bid documents and shall be lodged in a separate sealed envelope, with the name and address of the bidder, the bid number and closing date indicated on the envelope. The envelope shall not contain documents relating to any bid other than that shown on the envelope. If this provision is not complied with, such bids may be rejected as being invalid.
7. All bids received in sealed envelopes with the relevant bid numbers on the envelopes are kept unopened in safe custody until the closing time of the bids. Where, however, a bid is received open, it shall be sealed. If it is received without a bid number on the envelope, it shall be opened, the bid number ascertained, the envelope sealed and the bid number written on the envelope.
8. A specific box is provided for the receipt of bids, and no bid found in any other box or elsewhere subsequent to the closing date and time of bid will be considered.
9. No bid sent through the post will be considered if it is received after the closing date and time stipulated in the bid documentation, and proof of posting will not be accepted as proof of delivery.
10. No bid submitted by telefax, telegraphic or other electronic means will be considered.
11. Bidding documents must not be included in packages containing samples. Such bids may be rejected as being invalid.
12. Any alteration made by the bidder must be initialed.
13. Use of correcting fluid is prohibited
14. Use of erasable pen is prohibited
15. Bids will be opened in public as soon as practicable after the closing time of bid.
16. Where practical, prices are made public at the time of opening bids.
17. If it is desired to make more than one offer against any individual item, such offers should be given on a photocopy of the page in question. Clear indication thereof must be stated on the schedules attached.
18. Bidder must initial each and every page of the bid document.

Initials: _____

SECTION D: REGISTRATION ON THE CENTRAL SUPPLIERS DATABASE

1. In terms of the National Treasury Instruction Note, all suppliers of goods and services to the State are required to register on the Central Suppliers Database.

2. Prospective suppliers should self-register on the CSD website www.csd.gov.za

3. If a business is registered on the Database and it is found subsequently that false or incorrect information has been supplied, then the Department may, without prejudice to any other legal rights or remedies it may have;

3.1 cancel a bid or a contract awarded to such supplier, and the supplier would become liable for any damages if a less favorable bid is accepted or less favorable arrangements are made.

4. **The same principles as set out in paragraph 3 above are applicable should the supplier fail to request updating of its information on the Central Suppliers Database, relating to changed particulars or circumstances.**

5. IF THE SUPPLIER IS NOT REGISTERED AT THE CLOSING TIME OF BID, THE SUPPLIER WILL BE DISQUALIFIED AT THE BID EVALUATION PROCESS.

Initials: _____

SECTION E: DECLARATION THAT INFORMATION ON CENTRAL SUPPLIER DATABASE IS CORRECT AND UP TO DATE

(To be completed by bidder)

THIS IS TO CERTIFY THAT I (name of bidder/authorized representative) ……....., WHO

REPRESENTS (state name of bidder) ……..…….....CSD Registration

Number.....

AM AWARE OF THE CONTENTS OF THE CENTRAL SUPPLIER DATABASE WITH RESPECT TO THE BIDDER'S DETAILS AND REGISTRATION INFORMATION, AND THAT THE SAID INFORMATION IS CORRECT AND UP TO DATE AS ON THE DATE OF SUBMITTING THIS BID.

AND I AM AWARE THAT INCORRECT OR OUTDATED INFORMATION MAY BE A CAUSE FOR DISQUALIFICATION OF THIS BID FROM THE BIDDING PROCESS, AND/OR POSSIBLE CANCELLATION OF THE CONTRACT THAT MAY BE AWARDED ON THE BASIS OF THIS BID.

.....

SIGNATURE OF BIDDER OR AUTHORISED REPRESENTATIVE

DATE: .....

Initials: _____

SECTION F: 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 ZNT 05 EDTEA 26/27
Closing Time **11:00**	Closing date: 08/12/2026

OFFER TO BE VALID FOR 120 DAYS FROM THE CLOSING DATE OF BID.

ITEM NO.	QUANTITY	DESCRIPTION	Unit Price	Total for each unit
1				
2				
3				
4				
		SUB-TOTAL		
		VAT AT 15%		
		GRAND TOTAL (BID PRICE IN RSA CURRENCY WITH 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

Initials: _____

SECTION G: PRICING SCHEDULE

(Professional Services)

Name of bidder…… Closing Time **11:00**	Bid number… ZNT 05 EDTEA 26-27 Closing date…08/12/2026

OFFER TO BE VALID FOR 120 DAYS FROM THE CLOSING DATE OF BID.

ITEM NO.	DESCRIPTION	BID PRICE IN RSA CURRENCY WITH ALL APPLICABLE TAXES INCLUDED)

1. The accompanying information must be used for the formulation of proposals
2. Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project. R……..……...

3. PERSONS WHO WILL BE INVOLVED IN THE PROJECT AND RATES APPLICABLE (CERTIFIED INVOICES MUST BE RENDERED IN TERMS HEREOF)
4. PERSON AND POSITION

	HOURLY RATE	DAILY RATE
……	R……	……
……	R……	……
……	R……	……
……	R……	……
……	R……	……

5. PHASES ACCORDING TO WHICH THE PROJECT WILL BE COMPLETED, COST PER PHASE AND MAN-DAYS TO BE SPENT

……	R……	…… days
……	R……	…… days
……	R……	…… days
……	R……	…… days
……	R……	…… days

5.1 Travel expenses (specify, for example rate/km and total km, class of airtravel, etc). Only actual costs are recoverable. Proof of the expenses incurred must accompany certified invoices.

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT
……	……..	……..	R ……
……	……..	……..	R ……
……	……..	……..	R ……
……	……..	……..	R ……
……	……..	……..	R ……

TOTAL: R……

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

Travel expenses (specify, for example rate/km and total km, class of airtravel, etc). Only actual costs are recoverable. Proof of the expenses

Initials: _____

incurred must accompany certified invoices.

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT
……	……..	……..	R ……
……	……..	……..	R ……
……	……..	……..	R ……
……	……..	……..	R ……
……	……..	……..	R ……

TOTAL: R……..

6. Period required for commencement with project after acceptance of bid
7. Estimated man-days for completion of project
8. Are the rates quoted firm for the full period of contract?
9. If not firm for the full period, provide details of the basis on which adjustments will be applied for, for example consumer price index.

……

……

*YES/NO

……

……

……

……

***[DELETE IF NOT APPLICABLE]**

Any enquiries regarding bidding procedures may be directed to the –

(BIDS OFFICE)

Tel: 033 264 2731/ 2864

Or for technical information –

(Tshepiso Selepe)

Tel: **079 505 2402**

Initials: _____

SECTION H: BID OFFER

(To be completed by Bidder)

BID NUMBER: ZNT 05 EDTEA 26-27

1. BID PRICE INCLUDING VAT: R…….....

2. AMOUNT IN WORDS: ….....

.....

3. TIME FOR COMPLETION/ DELIVERY: ……..calendar months

NAME OF BIDDER:	**SIGNATURE**	**DATE:**
….....	…….....	.....

FOR OFFICE PURPOSES ONLY

IMPORTANT
Mark appropriate block with "X"

1. HAVE ANY ALTERATIONS BEEN MADE? YES NO

2. HAS AN ALTERNATIVE BID BEEN SUBMITTED? YES NO

3. ***IF APPLICABLE*:** DID THE BIDDER ATTEND THE OFFICIAL BRIEFING SESSION/ COMPULSORY SITE INSPECTION? YES NO

Initials: _____

SBD 4

SECTION I: BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

1.1. Any person (natural or juristic) may make an offer 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, 1996 (Constitution), and further expressed in the various applicable legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

1.2. If a person is 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. DECLARATION ON EMPLOYMENT BY ORGAN OF STATE

2.1 Is the bidder, or any of the directors / trustees / shareholders / members / partners of the bidder employed by an organ of state, as defined in section 239 of the Constitution? **YES [ ] NO [ ]**

2.2 If YES, furnish particulars of the names, individual identity numbers, in the table below:

Full Name	Identity Number	Name of organ of state

If the available rows are insufficient, please attach the referenced table as an annexure or add additional rows.

2.3 Does the bidder, or any of the directors / trustees / shareholders / members / partners of the bidder have a relationship with any person who is employed by the institution procuring the required goods or services? **YES [ ] NO [ ]**

2.3.1 If YES, complete the details of the relationship with the person employed by the institution procuring the required goods or services in table below.

Name of person in bidder	Name of person at institution	Nature of the relationship

If the available rows are insufficient, please attach the referenced table as an annexure or add additional rows.

2.4 Does the bidder or any of its directors / trustees / shareholders / members / partners have any interest[1] in any other related enterprise / company / trust, whether or not that enterprise / company / trust is bidding[2] for this requirement?
YES [ ] NO [ ]

2.4.1If YES, complete the details of the related enterprise / company / trust in the table below:

Registering authority	Name of related enterprise / company / trust	Registration number	Description of interest

If the available rows are insufficient, please attach the referenced table as an annexure or add additional rows.

1 Includes ''beneficial interest'' and ''personal financial interest'' as defined in the Companies Act 71 of 2008
2 Includes open competitive bidding / limited bidding/ requests for quotations/ requests for proposals/ unsolicited bids

Initials: _____

3 GENERAL DECLARATION

I, ……....., the undersigned, in submitting the accompanying bid for this requirement, do hereby make the following statements, on behalf of the bidder, that I certify to be true and complete in every respect:

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

3.2 I understand that the accompanying bid will be disqualified if this disclosure is found to be false.

3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor.

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.

3.5 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.

3.6 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the institution procuring the required goods or services 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.

3.7 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, 1998 (Act No. 89 of 1998) and or may be referred to law enforcement agencies for criminal investigation and or may be restricted from conducting business with the state for a period not exceeding 10 years in terms of the Prevention and Combating of Corrupt Activities Act, 2004 (Act No. 12 of 2004) or any other applicable legislation.

I CERTIFY THAT THE INFORMATION PROVIDED IS CORRECT.

I ACCEPT THAT THE INSTITUTION PROCURING THE REQUIRED GOODS OR SERVICES MAY REJECT THE BID OR TAKE APPROPRIATE ACTION AGAINST ME, THE BIDDER AND ANY OF ITS DIRECTORS / TRUSTEES / SHAREHOLDERS / MEMBERS / PARTNERS IF THIS DECLARATION IS FOUND TO BE FALSE.

…… ……

Signature Date

…….. ……...

Designation Name of bidder

Initials: _____

SECTION J:

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**

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 quotation 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

Initials: _____

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**

$$Ps = 80\left(1 - \frac{Pt - P\,min}{P\,min}\right) \quad \text{or} \quad Ps = 90\left(1 - \frac{Pt - P\,min}{P\,min}\right)$$

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

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

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

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,

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.

Initials: _____

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

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)	Documents to be submitted to claim points
Preference Goal 1- HDI			
African	4		Completed SBD 6.1, Completed ownership demographic form, and CIPC Certificate
Women	4		Completed SBD 6.1, Completed ownership demographic form and CIPC certificate
People living with disability	4		Completed SBD 6.1, Completed ownership demographic form, Doctor's medical/disability certificate and CIPC certificate
Preference Goal 2- RDP			
Youth	4		Completed SBD 6.1, Completed ownership demographic form, CIPC Certificate, and Copy of Identity document
Geographical Location (KZB BASED)	4		Completed SBD 6.1, Completed ownership demographic form, Utility bill letter/letter from the ward councillor/ lease agreement/Account statement and CIPC certificate
Total	**20**		

4.3. 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

Initials: _____

[TICK APPLICABLE BOX]

4.4. 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: ……

……

……
……

Initials: _____

OWNERSHIP DEMOGRAPHIC SCHEDULE

- ✓ **Kindly provide the percentage ownership for each owner according to the following demographic categories; African Male, African Female, Coloured Male, Coloured Female, Indian Male, Indian Female, White Male, White Female, Youth, Disabled, Co-operative and Other.**

NO.	ID NUMBER	% AFRICAN		% COLOURED		% INDIAN		% WHITE		% YOUTH	% DISABLED	% CO-OPERATIVE	% OTHER (Specify)
		MALE	FEMALE	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE				
1													
2													
3													
4													
5													
6													
7													
8													
9													
10													
TOTAL													

Initials: _____

SECTION K: QUESTIONNAIRE REPLIES

1. Are the prices/rates quoted firm? …….....

2. Is the delivery period stated firm? ……...

3. How will delivery be affected? ……

4. Is the equipment guaranteed for a minimum period of six months?..……...

5. Are you the accredited agents in the RSA for the manufacture/supply of the goods offered by you?
   .....

6. What is the address in the RSA (preferably in the Province of KwaZulu-Natal) where machine/goods as offered by you can be inspected under working conditions? ……...

7. What is the approximate value of spares carried in stock in the RSA for this particular make and model of machine?
   ……...

8. Where is stock held? ……..

9. What facilities exist for the servicing of the machine/goods offered?
   ……...

10. Where are these facilities available? ……...

11. What are the names and addresses of the factories where the goods will be manufactured and, if required, inspected?
    ……...

12. Is a special import permit require……...?

……. **…….**

SIGNATURE OF BIDDER **DATE**
(PRINT NAME)

N.B.: THIS FORM IS ONLY TO BE INCLUDED AND COMPLETED WHEN APPLICABLE TO THE QUOTATION

Initials: _____

SECTION L: OFFICIAL BRIEFING SESSION/SITE INSPECTION CERTIFICATE

COMPULSORY

N. B.: THIS FORM IS ONLY TO BE INCLUDED AND COMPLETED WHEN APPLICABLE TO THE BID.

Site/building/institution involved: Department of Economic Development, Tourism and Environmental Affairs

Bid No: ZNT 05 EDTEA 26-27

Service: APPOINTMENT OF A SUITABLY QUALIFIED SERVICE PROVIDER TO CONDUCT OPT-OUT REGISTRY AND DEBT COUNSELLING WORKSHOPS FOR OVER-INDEBTED CONSUMERS, ON CONSUMER EDUCATION AND AWARENESS IN 11 DISTRICTS OF KWAZULU-NATAL ON BEHALF OF THE KWAZULU-NATAL CONSUMER PROTECTOR FOR THE DEPARTMENT OF ECONOMIC DEVELOPMENT, TOURISM AND ENVIRONMENTAL AFFAIRS OVER A PERIOD OF 36 MONTHS.

Venue:	Date:	Time:
141 BOARDROOM 270 JABU NDLOVU STREET	16/11/2026	10H00

THIS IS TO CERTIFY THAT (NAME).....ON BEHALF OF.....

ATTENDED THE OFFCIAL BRIEFING ON..... (DATE)AND IS THEREFORE FAMILIAR WITH THE CIRCUMSTANCES AND THE SCOPE OF THE SERVICE TO BE RENDERED.

.....

SIGNATURE OF BIDDER OR AUTHORISED REPRESENTATIVE

(PRINT NAME)

DATE: .....

.....

SIGNATURE OF DEPARTMENTAL REPRESENTATIVE

(PRINT NAME)

DEPARTMENTAL STAMP:

(OPTIONAL)

DATE: .....

Initials: _____

SECTION M: SPECIAL CONDITIONS OF CONTRACT

This bid is subject to the Preferential Procurement Policy Framework Act and the Preferential Procurement Regulations, 2022; the General Conditions of Contract (GCC) and the following applicable other Special Conditions of Contract.

The offers must remain valid for a period of 120 days from the closing date of the submission of bids.

1. CONTRACT PERIOD

1.1 ***36 Months***

2. EVALUATION CRITERIA

There are *(four (4) evaluation phases)* main stages in the selection process, namely, ***Administrative Compliance, Functionality, Price and Preference points (Specific goals) and price negotiation.***

2.1 Step 1 - Administrative Compliance

Check and verify compliance with the submission and completion of compulsory bid documents viz Sections A to P. Failure to comply with any of the sections contained in the bid document that constitute step one will render the bid invalid

The following documentation must be submitted:

CRITERIA		**YES**	**NO**	**REMARKS**
SECTIO A PART A	INVITATION TO BID (SBD 1)	X		
SECTION A PART B	TERMS AND CONDITIONS FOR BIDDING (SBD 1)	X		
SECTION B	LIST OF RETURNABLE AND COMPULSORY DOCUMENTS	X		
SECTION C	SPECIAL INSTRUCTIONS REGARDING COMPLETION OF BID			Read only
SECTION D	REGISTRATION ON CENTRAL SUPPLIERS DATABASE	X		
SECTION E	DECLARATION THAT INFORMATION ON CENTRAL SUPPLIERS DATABASE	X		
SECTION F	PRICING SCHEDULE FIRM PRICES (SBD 3.1)	X		
SECTION G	PRICING SCHEDULE PROFESSIONAL SERVICES	X		
SECTION H	BID OFFER	X		
SECTION I	BIDDER'S DISCLOSURE (SBD 4)	X		
SECTION J	PREFERENCE POINTS CLAIM FORM (SBD 6.1)	X		
SECTION K	QUESTIONNAIRES REPLIES	X		
SECTION L	BRIEFING SESSION	X		Applicable
SECTION M	SPECIAL CONDITIONS OF CONTRACT	X		
SECTION N	GENERAL CONDITIONS OF CONTRACT			Read only
SECTION O	AUTHORITY TO SIGN THE BID	X		
SECTION P	SCHEDULE VARIATION FROM GOODS OR SERVICES INFORMATION			If applicable
Professional body accreditation or registration for the company NCR Registration	Valid proof of accreditation or registration letter to be attached	X		

Initials: _____

or Financial SETA OR QTCO				
Professional body accreditation or registration for the Team Leader CA(SA)	Valid proof of accreditation or registration letter to be attached	X		
NCR accreditation for Debt Counsellor	Valid proof of accreditation or registration letters to be attached	X		

2.2 Step 2 - Functionality

This bid will be evaluated on functionality. Bidders are to obtain a minimum qualifying score of 70% in order to proceed to the next stage of evaluation.

2.3 Step 3 - Preferential Point Evaluation

This bid will be evaluated using the 80/20/ preference point system. (SBD 6.1 to be completed in order to claim preference points as per specific goals stipulated. In order to claim points, required proof for each specific goal should be attached together with this bid. Failure to provide documents will results in non -allocation of preference points.

Specific goals	**Documents required to determine specific goals respectively**
Preference Goal 1- HDI	
Africans	Completed ownership demographic form, CIPC Certificate and completed SBD 6.1
Women	Completed ownership demographic form, CIPC Certificate and completed SBD 6.1
People with disability	Completed ownership demographic form, Doctor's Medical Certificate/Disability letter, and completed SBD 6.1
Preference Goal 2- RDP	
Youth	Completed ownership demographic form, CIPC Certificate Copy of Identity document and completed SBD 6.1
Geographical Location - KZN	Completed ownership demographic form, Utility bill letter/ letter from the ward councilor / lease agreement, and completed SBD 6.1

2.2 Step 4 - Price negotiation

Where applicable the department reserves the right to negotiate price with the recommended bidder.

3 BID APPEAL TRIBUNAL (BAT)

Initials: _____

BAT finds its establishment in the Treasury Regulation 16A9.3 and Section 18(1) of the KwaZulu-Natal Supply Chain Management Policy Framework. Treasury Regulation 16A9.3 empowers National and Provincial Treasury to establish a mechanism to consider complaints and make recommendations for remedial actions to be taken for the non-compliance with the norms and standards. Section 18(1) of the KZN SCM Policy Framework empowers the MEC for Finance to establish an independent and impartial Bid Appeals Tribunal. In line with Paragraph 19 of the KZN SCM Policy Framework of 2006 the following procedure must be followed to lodge an appeal:

1.1 The bidder must, within five working days of receipt of the **notification** of an award, deliver written notification of an intention to appeal.

1.2 All award notifications will be published on the departmental website, and where applicable in the relevant newspapers. Service providers will also be notified through an official notification letter.

1.3 The bidder may, together with the notification of intention to appeal under paragraph (2) of the KZN SCM Policy Framework, deliver a request for written reasons for the award of the said bid.

1.4 The Bid Adjudication Committee or a delegate of an accounting officer must deliver to the appellant the written reasons requested under paragraph (3) of the KZN SCM Policy Framework within ten working days.

1.5 The appellant must, within ten working days of receipt of the written reasons delivered under paragraph (4) of the KZN SCM Policy Framework, or, failing a request for written reasons under paragraph (3) of the KZN SCM Policy Framework, within ten working days of giving notice under paragraph (2) of the KZN SCM Policy Framework, submit written representations to the Bid Appeals Tribunal, indicating sufficiently and without unnecessary elaboration the grounds and basis of the appeal and the nature of the complaint.

1.6 Upon receipt of a notice of intention to appeal, the Bid Appeals Tribunal must notify other bidders who may be adversely affected by the appeal, in writing of the appeal and invite them to respond within five working days.

1.7 Award notification on the e-tender portal will only be published once a confirmation of no appeals has been received from Provincial Treasury, therefore, no appeals will be considered after the award information has been published on the E-Tender portal.

The address provided for the lodging of appeals is:

Email: Batsecretariat@kzntreasury.gov.za

The Chairperson
Bid Appeals Tribunal
Private Bag X9082
Pietermaritzburg
3200

Initials: _____

SECTION N: GENERAL CONDITIONS OF CONTRACT

1. Definitions

The following terms shall be interpreted as indicated:

1.1 “Closing time” means the date and hour specified in the bidding documents for the receipt of bids.

1.2 “Contract” means the written agreement entered into between the purchaser and the supplier, as recorded in the contract form signed by the parties, including all attachments and appendices thereto and all documents incorporated by reference therein.

1.3 “Contract price” means the price payable to the supplier under the contract for the full and proper performance of his contractual obligations.

1.4 “Corrupt practice” means the offering, giving, receiving, or soliciting of anything of value to influence the action of a public official in the procurement process or in contract execution.

1.5 "Countervailing duties" are imposed in cases where an enterprise abroad is subsidized by its government and encouraged to market its products internationally.

1.6 “Country of origin” means the place where the goods were mined, grown or produced or from which the services are supplied. Goods are produced when, through manufacturing, processing or substantial and major assembly of components, a commercially recognized new product results that is substantially different in basic characteristics or in purpose or utility from its components.

1.7 “Day” means calendar day.

1.8 “Delivery” means delivery in compliance of the conditions of the contract or order.

1.9 “Delivery ex stock” means immediate delivery directly from stock actually on hand.

1.10 “Delivery into consignees store or to his site” means delivered and unloaded in the specified store or depot or on the specified site in compliance with the conditions of the contract or order, the supplier bearing all risks and charges involved until the supplies are so delivered and a valid receipt is obtained.

1.11 "Dumping" occurs when a private enterprise abroad market its goods on own initiative in the RSA at lower prices than that of the country of origin and which have the potential to harm the local industries in the RSA.

1.12 ”Force majeure” means an event beyond the control of the supplier and not involving the supplier’s fault or negligence and not foreseeable. Such events may include, but is not restricted to, acts of the purchaser in its sovereign capacity, wars or revolutions, fires, floods, epidemics, quarantine restrictions and freight embargoes.

1.13 “Fraudulent practice” means a misrepresentation of facts in order to influence a procurement process or the execution of a contract to the detriment of any bidder, and includes collusive practice among bidders (prior to or after bid submission) designed to establish bid prices at artificial non-competitive levels and to deprive the bidder of the benefits of free and open competition.

1.14 “GCC” means the General Conditions of Contract.

1.15 “Goods” means all of the equipment, machinery, and/or other materials that the supplier is required to supply to the purchaser under the contract.

1.16 “Imported content” means that portion of the bidding price represented by the cost of components, parts or materials which have been or are still to be imported (whether by the supplier or his subcontractors) and which costs are inclusive of the costs abroad, plus freight and other direct importation costs such as landing costs, dock dues, import duty, sales duty or other similar tax or duty at the South African place of entry as well as transportation and handling charges to the factory in the Republic where the supplies covered by the bid will be manufactured.

1.17 “Local content” means that portion of the bidding price which is not included in the imported content provided that local manufacture does take place.

1.18 “Manufacture” means the production of products in a factory using labour, materials, components and machinery and includes other related value-adding activities.

Initials: _____

1.19 "Order" means an official written order issued for the supply of goods or works or the rendering of a service.

1.20 "Project site," where applicable, means the place indicated in bidding documents.

1.21 "Purchaser" means the organization purchasing the goods.

1.22 "Republic" means the Republic of South Africa.

1.23 "SCC" means the Special Conditions of Contract.

1.24 "Services" means that functional services ancillary to the supply of the goods, such as transportation and any other incidental services, such as installation, commissioning, provision of technical assistance, training, catering, gardening, security, maintenance and other such obligations of the supplier covered under the contract.

1.25 "Written" or "in writing" means handwritten in ink or any form of electronic or mechanical writing.

2. Application

2.1 These general conditions are applicable to all bids, contracts and orders including bids for functional and professional services, sales, hiring, letting and the granting or acquiring of rights, but excluding immovable property, unless otherwise indicated in the bidding documents.
2.2 Where applicable, special conditions of contract are also laid down to cover specific supplies, services or works.
2.3 Where such special conditions of contract are in conflict with these general conditions, the special conditions shall apply.

3. General

3.1 Unless otherwise indicated in the bidding documents, the purchaser shall not be liable for any expense incurred in the preparation and submission of a bid. Where applicable a non-refundable fee for documents may be charged.

3.2 With certain exceptions, invitations to bid are only published in the Government Tender Bulletin. The Government Tender Bulletin may be obtained directly from the Government Printer, Private Bag X85, Pretoria 0001, or accessed electronically from www.treasury.gov.za

4. Standards

4.1 The goods supplied shall conform to the standards mentioned in the bidding documents and specifications.

5. Use of contract documents and information; inspection.

5.1 The supplier shall not, without the purchaser's prior written consent, disclose the contract, or any provision thereof, or any specification, plan, drawing, pattern, sample, or information furnished by or on behalf of the purchaser in connection therewith, to any person other than a person employed by the supplier in the performance of the contract. Disclosure to any such employed person shall be made in confidence and shall extend only so far as may be necessary for purposes of such performance.
5.2 The supplier shall not, without the purchaser's prior written consent, make use of any document or information mentioned in GCC clause 5.1 except for purposes of performing the contract.
5.3 Any document, other than the contract itself mentioned in GCC clause 5.1 shall remain the property of the purchaser and shall be returned (all copies) to the purchaser on completion of the supplier's performance under the contract if so required by the purchaser.
5.4 The supplier shall permit the purchaser to inspect the supplier's records relating to the performance of the supplier and to have them audited by auditors appointed by the purchaser, if so required by the purchaser.

6. Patent rights

6.1 The supplier shall indemnify the purchaser against all third-party claims of infringement of patent, trademark, or industrial design rights arising from use of the goods or any part thereof by the purchaser.

7. Performance security

7.1 Within thirty (30) days of receipt of the notification of contract award, the successful bidder shall furnish to the purchaser the performance security of the amount specified in SCC.

Initials: _____

7.2 The proceeds of the performance security shall be payable to the purchaser as compensation for any loss resulting from the supplier's failure to complete his obligations under the contract.

7.3 The performance security shall be denominated in the currency of the contract or in a freely convertible currency acceptable to the purchaser and shall be in one of the following forms:

ii) a bank guarantee or an irrevocable letter of credit issued by a reputable bank located in the purchaser's country or abroad, acceptable to the purchaser, in the form provided in the bidding documents or another form acceptable to the purchaser; or

iii) a cashier's or certified cheque

iv) The performance security will be discharged by the purchaser and returned to the supplier not later than thirty (30) days following the date of completion of the supplier's performance obligations under the contract, including any warranty obligations, unless otherwise specified in SCC.

8. Inspections, tests and analyses

8.1 All pre-bidding testing will be for the account of the bidder.

8.2 If it is a bid condition that supplies to be produced or services to be rendered should at any stage during production or execution or on completion be subject to inspection, the premises of the bidder or contractor shall be open, at all reasonable hours, for inspection by a representative of the Department or an organization acting on behalf of the Department.

8.3 If there are no inspection requirements indicated in the bidding documents and no mention is made in the contract, but during the contract period it is decided that inspections shall be carried out, the purchaser shall itself make the necessary arrangements, including payment arrangements with the testing authority concerned.

8.4 If the inspections, tests and analyses referred to in clauses 8.2 and 8.3 show the supplies to be in accordance with the contract requirements, the cost of the inspections, tests and analyses shall be defrayed by the purchaser.

8.5 Where the supplies or services referred to in clauses 8.2 and 8.3 do not comply with the contract requirements, irrespective of whether such supplies or services are accepted or not, the cost in connection with these inspections, tests or analyses shall be defrayed by the supplier.

8.6 Supplies and services which are referred to in clauses 8.2 and 8.3 and which do not comply with the contract requirements may be rejected.

8.7 Any contract supplies may on or after delivery be inspected, tested or analyzed and may be rejected if found not to comply with the requirements of the contract. Such rejected supplies shall be held at the cost and risk of the supplier who shall, when called upon, remove them immediately at his own cost and forthwith substitute them with supplies which do comply with the requirements of the contract. Failing such removal the rejected supplies shall be returned at the suppliers cost and risk. Should the supplier fail to provide the substitute supplies forthwith, the purchaser may, without giving the supplier further opportunity to substitute the rejected supplies, purchase such supplies as may be necessary at the expense of the supplier.

8.8 The provisions of clauses 8.4 to 8.7 shall not prejudice the right of the purchaser to cancel the contract on account of a breach of the conditions thereof, or to act in terms of Clause 23 of GCC.

9. Packing

9.1 The supplier shall provide such packing of the goods as is required to prevent their damage or deterioration during transit to their final destination, as indicated in the contract. The packing shall be sufficient to withstand, without limitation, rough handling during transit and exposure to extreme temperatures, salt and precipitation during transit, and open storage. Packing, case size and weights shall take into consideration, where appropriate, the remoteness of the goods' final destination and the absence of heavy handling facilities at all points in transit.

9.2 The packing, marking, and documentation within and outside the packages shall comply strictly with such special requirements as shall be expressly provided for in the contract, including additional requirements, if any, specified in SCC, and in any subsequent instructions ordered by the purchaser.

10. Delivery and documents

10.1 Delivery of the goods shall be made by the supplier in accordance with the terms specified in the contract. The details of shipping and/or other documents to be furnished by the supplier are specified in SCC.

Initials: _____

10.2 Documents to be submitted by the supplier are specified in SCC.

11. Insurance

a. The goods supplied under the contract shall be fully insured in a freely convertible currency against loss or damage incidental to manufacture or acquisition, transportation, storage and delivery in the manner specified in the SCC.

12. Transportation

a. Should a price other than an all-inclusive delivered price be required, this shall be specified in the SCC.

13. Incidental Services

13.1 The supplier may be required to provide any or all of the following services, including additional services, if any, specified in SCC:

(a) performance or supervision of on-site assembly and/or commissioning of the supplied goods;
(b) furnishing of tools required for assembly and/or maintenance of the supplied goods;
(c) furnishing of a detailed operations and maintenance manual for each appropriate unit of the supplied goods;
(d) performance or supervision or maintenance and/or repair of the supplied goods, for a period of time agreed by the parties, provided that this service shall not relieve the supplier of any warranty obligations under this contract; and
(e) training of the purchaser's personnel, at the supplier's plant and/or on-site, in assembly, start-up, operation, maintenance, and/or repair of the supplied goods.

13.2 Prices charged by the supplier for incidental services, if not included in the contract price for the goods, shall be agreed upon in advance by the parties and shall not exceed the prevailing rates charged to other parties by the supplier for similar services.

14 Spare parts

14.1 As specified in SCC, the supplier may be required to provide any or all of the following materials, notifications, and information pertaining to spare parts manufactured or distributed by the supplier:

(a) such spare parts as the purchaser may elect to purchase from the supplier, provided that this election shall not relieve the supplier of any warranty obligations under the contract; and
(b) in the event of termination of production of the spare parts:
  (i) Advance notification to the purchaser of the pending termination, in sufficient time to permit the purchaser to procure needed requirements; and
  (ii) following such termination, furnishing at no cost to the purchaser, the blueprints, drawings, and specifications of the spare parts, if requested.

15 Warranty

15.1 The supplier warrants that the goods supplied under the contract are new, unused, of the most recent or current models, and that they incorporate all recent improvements in design and materials unless provided otherwise in the contract. The supplier further warrants that all goods supplied under this contract shall have no defect, arising from design, materials, or workmanship (except when the design and/or material is required by the purchaser's specifications) or from any act or omission of the supplier, that may develop under normal use of the supplied goods in the conditions prevailing in the country of final destination.

15.2 This warranty shall remain valid for twelve (12) months after the goods, or any portion thereof as the case may be, have been delivered to and accepted at the final destination indicated in the contract, or for eighteen (18) months after the date of shipment from the port or place of loading in the source country, whichever period concludes earlier, unless specified otherwise in SCC.

15.3 The purchaser shall promptly notify the supplier in writing of any claims arising under this warranty.

15.4 Upon receipt of such notice, the supplier shall, within the period specified in SCC and with all reasonable speed, repair or replace the defective goods or parts thereof, without costs to the purchaser.

15.5 If the supplier, having been notified, fails to remedy the defect(s) within the period specified in SCC, the purchaser may proceed to take such remedial action as may be necessary, at the supplier's risk and expense and without prejudice to any other rights which the purchaser may have against the supplier under the contract.

Initials: _____

16 Payment

16.1 The method and conditions of payment to be made to the supplier under this contract shall be specified in SCC.

16.2 The supplier shall furnish the purchaser with an invoice accompanied by a copy of the delivery note and upon fulfillment of other obligations stipulated in the contract.

16.3 Payments shall be made promptly by the purchaser, but in no case later than thirty (30) days after submission of an invoice or claim by the supplier.

16.4 Payment will be made in Rand unless otherwise stipulated in SCC.

17 Prices

17.1 Prices charged by the supplier for goods delivered and services performed under the contract shall not vary from the prices quoted by the supplier in his bid, with the exception of any price adjustments authorized in SCC or in the purchaser's request for bid validity extension, as the case may be.

18 Contract amendments

18.1 No variation in or modification of the terms of the contract shall be made except by written amendment signed by the parties concerned.

19 Assignment

19.1 The supplier shall not assign, in whole or in part, its obligations to perform under the contract, except with the purchaser's prior written consent.

20 Subcontracts

20.1 The supplier shall notify the purchaser in writing of all subcontracts awarded under this contracts if not already specified in the bid. Such notification, in the original bid or later, shall not relieve the supplier from any liability or obligation under the contract.

21 Delays in the supplier's performance

21.1 Delivery of the goods and performance of services shall be made by the supplier in accordance with the time schedule prescribed by the purchaser in the contract.

21.2 If at any time during performance of the contract, the supplier or its subcontractor(s) should encounter conditions impeding timely delivery of the goods and performance of services, the supplier shall promptly notify the purchaser in writing of the fact of the delay, its likely duration and its cause(s). As soon as practicable after receipt of the supplier's notice, the purchaser shall evaluate the situation and may at his discretion extend the supplier's time for performance, with or without the imposition of penalties, in which case the extension shall be ratified by the parties by amendment of contract.

21.3 No provision in a contract shall be deemed to prohibit the obtaining of supplies or services from a national department, provincial department, or a local authority.

21.4 The right is reserved to procure outside of the contract small quantities or to have minor essential services executed if an emergency arises, the supplier's point of supply is not situated at or near the place where the supplies are required, or the supplier's services are not readily available.

21.5 Except as provided under GCC Clause 25, a delay by the supplier in the performance of its delivery obligations shall render the supplier liable to the imposition of penalties, pursuant to GCC Clause 22, unless an extension of time is agreed upon pursuant to GCC Clause 21.2 without the application of penalties.

21.6 Upon any delay beyond the delivery period in the case of a supplies contract, the purchaser shall, without cancelling the contract, be entitled to purchase supplies of a similar quality and up to the same quantity in substitution of the goods not supplied in conformity with the contract and to return any goods delivered later at the supplier's expense and risk, or to cancel the contract and buy such goods as may be required to complete the contract and without prejudice to his other rights, be entitled to claim damages from the supplier.

22 Penalties

Initials: _____

22.1 Subject to GCC Clause 25, if the supplier fails to deliver any or all of the goods or to perform the services within the period(s) specified in the contract, the purchaser shall, without prejudice to its other remedies under the contract, deduct from the contract price, as a penalty, a sum calculated on the delivered price of the delayed goods or unperformed services using the current prime interest rate calculated for each day of the delay until actual delivery or performance. The purchaser may also consider termination of the contract pursuant to GCC Clause 23.

23 Termination for default

23.1 The purchaser, without prejudice to any other remedy for breach of contract, by written notice of default sent to the supplier, may terminate this contract in whole or in part:

(a) if the supplier fails to deliver any or all of the goods within the period(s) specified in the contract, or within any extension thereof granted by the purchaser pursuant to GCC Clause 21.2;
(b) if the Supplier fails to perform any other obligation(s) under the contract; or
(c) if the supplier, in the judgment of the purchaser, has engaged in corrupt or fraudulent practices in competing for or in executing the contract.

23.2 In the event the purchaser terminates the contract in whole or in part, the purchaser may procure, upon such terms and in such manner as it deems appropriate, goods, works or services similar to those undelivered, and the supplier shall be liable to the purchaser for any excess costs for such similar goods, works or services. However, the supplier shall continue performance of the contract to the extent not terminated.

23.3 Where the purchaser terminates the contract in whole or in part, the purchaser may decide to impose a restriction penalty on the supplier by prohibiting such supplier from doing business with the public sector for a period not exceeding 10 years.

23.4 If a purchaser intends imposing a restriction on a supplier or any person associated with the supplier, the supplier will be allowed a time period of not more than fourteen (14) days to provide reasons why the envisaged restriction should not be imposed. Should the supplier fail to respond within the stipulated fourteen (14) days the purchaser may regard the intended penalty as not objected against and may impose it on the supplier.

23.5 Any restriction imposed on any person by the Accounting Officer / Authority will, at the discretion of the Accounting Officer / Authority, also be applicable to any other enterprise or any partner, manager, director or other person who wholly or partly exercises or exercised or may exercise control over the enterprise of the first-mentioned person, and with which enterprise or person the first-mentioned person, is or was in the opinion of the Accounting Officer / Authority actively associated.

23.6 If a restriction is imposed, the purchaser must, within five (5) working days of such imposition, furnish the National Treasury, with the following information:

(i) the name and address of the supplier and / or person restricted by the purchaser;
(ii) the date of commencement of the restriction
(iii) the period of restriction; and
(iv) the reasons for the restriction.

23.6.1 These details will be loaded in the National Treasury's central database of suppliers or persons prohibited from doing business with the public sector.

23.7 If a court of law convicts a person of an offence as contemplated in sections 12 or 13 of the Prevention and Combating of Corrupt Activities Act, No. 12 of 2004, the court may also rule that such person's name be endorsed on the Register for Tender Defaulters. When a person's name has been endorsed on the Register, the person will be prohibited from doing business with the public sector for a period not less than five years and not more than 10 years. The National Treasury is empowered to determine the period of restriction and each case will be dealt with on its own merits. According to section 32 of the Act the Register must be open to the public. The Register can be perused on the National Treasury website.

24 Anti-dumping and countervailing duties and rights

24.1 When, after the date of bid, provisional payments are required, or antidumping or countervailing duties are imposed, or the amount of a provisional payment or anti-dumping or countervailing right is increased in respect of any dumped or subsidized import, the State is not liable for any amount so required or imposed, or for the amount of any such increase. When, after the said date, such a provisional payment is no longer required or any such anti-dumping or countervailing right is abolished, or where the amount of such provisional payment or any such right is reduced, any such favourable difference shall on demand be paid forthwith by the contractor to the State or the State may deduct such amounts from moneys (if any) which may otherwise be due to the contractor in regard to supplies or services which he delivered or rendered, or is to deliver or render in terms of the contract or any other contract or any other amount which may be due to him.

Initials: _____

25 Force Majeure

25.1 Notwithstanding the provisions of GCC Clauses 22 and 23, the supplier shall not be liable for forfeiture of its performance security, damages, or termination for default if and to the extent that his delay in performance or other failure to perform his obligations under the contract is the result of an event of force majeure.

25.2 If a force majeure situation arises, the supplier shall promptly notify the purchaser in writing of such condition and the cause thereof. Unless otherwise directed by the purchaser in writing, the supplier shall continue to perform its obligations under the contract as far as is reasonably practical, and shall seek all reasonable alternative means for performance not prevented by the force majeure event.

26 Termination for insolvency

26.1 The purchaser may at any time terminate the contract by giving written notice to the supplier if the supplier becomes bankrupt or otherwise insolvent. In this event, termination will be without compensation to the supplier, provided that such termination will not prejudice or affect any right of action or remedy which has accrued or will accrue thereafter to the purchaser.

27 Settlement of Disputes

27.1 If any dispute or difference of any kind whatsoever arises between the purchaser and the supplier in connection with or arising out of the contract, the parties shall make every effort to resolve amicably such dispute or difference by mutual consultation.

27.2 If, after thirty (30) days, the parties have failed to resolve their dispute or difference by such mutual consultation, then either the purchaser or the supplier may give notice to the other party of his intention to commence with mediation. No mediation in respect of this matter may be commenced unless such notice is given to the other party.

27.3 Should it not be possible to settle a dispute by means of mediation, it may be settled in a South African court of law.

27.4 Mediation proceedings shall be conducted in accordance with the rules of procedure specified in the SCC.

27.5 Notwithstanding any reference to mediation and/or court proceedings herein,

(a) the parties shall continue to perform their respective obligations under the contract unless they otherwise agree; and
(b) the purchaser shall pay the supplier any monies due the supplier.

28 Limitation of liability

28.1 Except in cases of criminal negligence or willful misconduct, and in the case of infringement pursuant to Clause 6;
(a) the supplier shall not be liable to the purchaser, whether in contract, tort, or otherwise, for any indirect or consequential loss or damage, loss of use, loss of production, or loss of profits or interest costs, provided that this exclusion shall not apply to any obligation of the supplier to pay penalties and/or damages to the purchaser; and
(b) the aggregate liability of the supplier to the purchaser, whether under the contract, in tort or otherwise, shall not exceed the total contract price, provided that this limitation shall not apply to the cost of repairing or replacing defective equipment.

29 Governing language

29.1 The contract shall be written in English. All correspondence and other documents pertaining to the contract that is exchanged by the parties shall also be written in English.

30 Applicable law

30.1 The contract shall be interpreted in accordance with South African laws, unless otherwise specified in SCC.

31 Notices

31.1 Every written acceptance of a bid shall be posted to the supplier concerned by registered or certified mail and any other notice to him shall be posted by ordinary mail to the address furnished in his bid or to the address notified later by him in writing and such posting shall be deemed to be proper service of such notice

Initials: _____

31.2 The time mentioned in the contract documents for performing any act after such aforesaid notice has been given, shall be reckoned from the date of posting of such notice.

32 Taxes and duties

32.1 A foreign supplier shall be entirely responsible for all taxes, stamp duties, license fees, and other such levies imposed outside the purchaser's country.

32.2 A local supplier shall be entirely responsible for all taxes, duties, license fees, etc., incurred until delivery of the contracted goods to the purchaser.

32.3 No contract shall be concluded with any bidder whose tax matters are not in order. Prior to the award of a bid the Department must be in possession of a tax clearance certificate, submitted by the bidder. This certificate must be an original issued by the South African Revenue Services.

33 National Industrial Participation (NIP) Programme

33.1 The NIP Programme administered by the Department of Trade and Industry shall be applicable to all contracts that are subject to the NIP obligation.

34 Prohibition of Restrictive practices

34.1 In terms of section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, an agreement between, or concerted practice by, firms, or a decision by an association of firms, is prohibited if it is between parties in a horizontal relationship and if a bidder (s) is / are or a contractor(s) was / were involved in collusive bidding (or bid rigging).

34.2 If a bidder(s) or contractor(s), based on reasonable grounds or evidence obtained by the purchaser, has / have engaged in the restrictive practice referred to above, the purchaser may refer the matter to the Competition Commission for investigation and possible imposition of administrative penalties as contemplated in the Competition Act No. 89 of 19

Initials: _____

SECTION O: AUTHORITY TO SIGN A BID

AUTHORITY TO SIGN A BID

The bidder must indicate the enterprise status by ticking the appropriate box hereunder.

(I) CLOSE CORPORATION	(II) COMPANIES	(III) SOLE PROPRIETOR	(IV) PARTNERSHIP	(V) CO-OPERATIVE	(VI) JOINT VENTURE / CONSORTIUM	
					Incorporated	
					Unincorporated	

I/We, the undersigned, being the Member(s) of Cooperative/ Sole Owner (Sole Proprietor)/ Close Corporation/ Partners (Partnership)/ Company (Representative) or Lead Partner (Joint Venture / Consortium), in the enterprise trading as:-_____

_____

hereby authorise Mr/Mrs/Ms_____

acting in the capacity of_____

whose signature is_____

to sign all documents in connection with this bid and any contract resulting therefrom on behalf of the enterprise.

NAME	ADDRESS	SIGNATURE	DATE

(If the space provided is not enough, a separate list should be attached)

Note:

Members of the enterprise must complete this form in full according to the type of enterprise, authorising the signatory to sign all documents in connection with this bid and any contract resulting therefrom on behalf of the enterprise.

Note: In a case of a Sole proprietor, a director may appoint himself/herself if they will be the one signing all documents in connection with this bid and any contract resulting therefrom on behalf of the enterprise.

Initials: _____

SECTION P: SCHEDULE VARIATIONS FROM GOODS OR SERVICES INFORMATION

Should the Bidder wish to make any departure from or modification in the Special Conditions of Contract, Specifications, Schedule list of Prices/ Quantities/ Drawings or to qualify the bid in any way, he/she shall indicate the proposals clearly hereunder or alternatively make photocopies of the original bid documentation.

SECTION	PAGE	VARIATION: CLAUSE OR ITEM

SIGNATURE OF BIDDER: .....

DATE: .....

Initials: _____

APPOINTMENT OF A SUITABLY QUALIFIED SERVICE PROVIDER TO CONDUCT OPT-OUT REGISTRY AND DEBT COUNSELLING WORKSHOPS FOR OVER-INDEBTED CONSUMERS, ON CONSUMER EDUCATION AND AWARENESS IN 11 DISTRICTS OF KWAZULU-NATAL ON BEHALF OF THE KWAZULU-NATAL CONSUMER PROTECTOR FOR THE DEPARTMENT OF ECONOMIC DEVELOPMENT, TOURISM AND ENVIRONMENTAL AFFAIRS OVER A PERIOD OF 36 MONTHS.

Initials: _____

1. Definitions of Acronyms/Glossary

CPA	Consumer Protection Act
EDTEA	Economic Development, Tourism and Environmental Affairs
KZN	KwaZulu-Natal
MEC	Member of the Executive Council
SETA	Sector Education and Training Authority
SAQA	South African Qualifications Authority
NQF	National Qualifications Framework
SA	South Africa
SCM	Supply Chain Management
SLA	Service Level Agreement
TOR	Terms of Reference
CSD	Central Supplier Database
SBD	Standard Bidding Document
CIPC	Companies and Intellectual Property Commission
NCR	National Credit Regulator
NCA	National Credit Act 34 of 2005
ITC	Information Trust Corporation
CPS	Consumer Protection Act
HDI	Historically Disadvantaged Institutions
VAT	Value Added Tax
RDP	Reconstruction and Development Project
POPIA	Protection of Personal Information Act
PPPFA	Preferential Procurement Policy Framework Act
CV	Curriculum Vitae
EME	Exempted Micro Enterprise
QSE	Qualifying Small Enterprise

Initials: _____

1. DEFINITIONS

- **"Financial Literacy"** education for consumers who are heavily indebted and blacklisted with negative credit records teaching them practical ways of saving and spending money wisely.
- "**Loan Sharks and Loan Sharks Rescue Programme"** when consumers are not credit worthy and cannot get loans from the banks then they resort to loan sharks which put them in a debt-spiral trap for years.
- **"Removal of Negative Debt Listing"** the programme will assist consumers who has a credit record with judgements, defaults or traces and consumers will be assisted with the removal of these negative listings.

- "**Clearance of Old & Prescribed Debt"** when consumers are not credit worthy and cannot get loans from the banks as a result of old prescribed debt. The National Credit Act 34 of 2005 states that old debt can be classified as prescribed and this programme will be assisting consumers to clear old prescribed debts.

- "**Debt Review "** the programme will be assisting consumers who want to be assisted on debt review and removal thereof without any cost from debt counsellors.

- "**Updates on Credit History and ITC Clearance**" assist consumers with clearing of negative history, ITC clearance and thereby rebuilding a positive ITC record/profile.

- **"Savings"** is an edutainment campaign which will encourage consumers to draft monthly budgets that will assist in curbing unnecessary spending and directly to saving.

- "**Spending Wisely"** edutainment campaigns will be rolled out during the festive season as consumers are much known for being impulsive buyers, not being able to distinguish between the needs and the wants.

- "**Black Friday Tips**" debt counselling programme will protect consumers against compulsive buying and encourage consumers to save and spend money wisely.

- "**Borrow money wisely"** debt counselling programme will sensitize consumers to borrow money wisely from reputable banks and ensure that they borrow within the budget and what they can afford to pay back to the banks.

- "**Illegal loan shark-Omashonisa"** debt counselling programme will also educate and caution consumers to only borrow from registered banks.

- "**Opt Out Registry"** the opt out registry is in terms of the amendments of the Consumer Protection Act to protect consumers from intrusive spam calls by opportunistic telemarketers. This process will provide an opportunity for registration of pre emptive block for consumers in order to protect the consumers against telemarketers in order to ensure that consumers do not fall prey to scammers and unnecessary debts and awareness will be created to consumers to subscribe on the Opt Out registry.

Initials: _____

Departmental and Programme Overview

The Department of Economic Development, Tourism and Environmental Affairs (EDTEA) intends to appoint a service provider to provide education and awareness on financial literacy, required for a period of 36 months in line with the department's legislative mandate in terms of the KwaZulu Natal Consumer Protection Act 04 of 2013 which requires the department to use means suitable for educating consumers on trending consumer topics of interest to the public.

The initiative is required in response to the increase in consumer complaints in the province relating to the financial sector on over-indebtedness, the increase in bogus investment schemes, pyramid schemes and mashonisa loans which involved people falling prey to unlawful attachments of their goods, death threats and other financial harms. It has become necessary for the Office of the Consumer Protector to use appropriate and effective means to raise the consumer education and awareness particularly among vulnerable consumers throughout the province on financial literacy. The provincial marketplace remains in need of reformation through impactful measures aimed at educating consumers on their financial safety and protection from unfair business practices. The provincial legislative, Section 23 of the KwaZulu Natal Consumer Protection Act 04 of 2013 mandates the Office of the Consumer Protector to ensure consumers are adequately educated on trending financial safety issues to ensure economic growth and promote fair trading practices and financial stability.

South African consumers are facing intense financial pressure, characterized by a high cost of living, significant over-indebtedness, and reliance on credit to cover basic daily expenses. Despite improvements in financial inclusion, many households are experiencing stagnating or deteriorating financial circumstances, with nearly 12 million adults estimated to be over-indebted and 40% of credit-active consumers in default by early 2025.

The Office of Consumer Affairs has a mandate to conduct consumer education and awareness campaigns throughout the Kwazulu-Natal province during the financial year. Furthermore, in terms of the unit's Annual Performance Plan, a target of 1400 consumer education and awareness programmes which must be achieved. In light of the above, EDTEA intends to passionately pursue this much needed mandate to empower and educate the people of our province by conducting debt counselling and opt out registry workshop programmes in order to assist and protect consumers who are heavily indebted and blacklisted.

Most importantly, the consumer education and awareness programme on debt counselling and opt out registry workshops will be targeting the most vulnerable consumers mostly in the townships and rural areas. The workshops will be targeting all 11 districts whereby we are planning to use local townships and rural community halls as venues.

The benefits of conducting these debt counselling and opt out registry workshops in rural/township communities is that we will be able to reach out to large audiences and thereby disseminating the consumer education awareness programmes in a practical manner onsite whereby consumers are empowered on the spot to have clean credit and financial records. Specifically, the debt counselling and opt out registry programme will be focusing on the following particular themes namely;

- **"Financial Literacy"** education for consumers who are heavily indebted and blacklisted with negative credit records teaching them practical ways of saving and spending money wisely. The purpose of this initiative will be to teach consumers the value of

Initials: _____

money and also to ensure that they live a simple life within their means and without incurring further debts. The intention is to ensure that consumers are groomed not to fall into the trap of living in debts and live within their financial means by being money wise.

- "**Loan Sharks and Loan Sharks Rescue Programme"** when consumers are not credit worthy and cannot get loans from the banks then they resort to loan sharks which put them in a debt-spiral trap for years. This programme will assist consumers in consolidating their debts at no cost.
- **"Removal of Negative Debt Listing"** the programme will assist consumers who has a credit record with judgements, defaults or traces and consumers will be assisted with the removal of these negative listings.

- "**Clearance of Old & Prescribed Debt"** when consumers are not credit worthy and cannot get loans from the banks as a result of old prescribed debt. The National Credit Act 68 of 1969 states that old debt can be classified as prescribed and this programme will be assisting consumers to clear old prescribed debts.

- "**Debt Review "** the programme will be assisting consumers who want to be assisted on debt review and removal thereof without any cost from debt counsellors.

- "**Updates on Credit History and ITC Clearance**" consumers will be assisted with clearing of negative history, ITC clearance and thereby rebuilding a positive ITC record/profile.

- **"Savings"** edutainment campaign which will encourage consumers to draft monthly budgets that will assist in curbing unnecessary spending and directly to saving.

- "**Spending Wisely"** edutainment campaigns will be rolled out during the festive season as consumers are much known for being impulsive buyers, not being able to distinguish between the needs and the wants.

- "**Black Friday Tips**" debt counselling programme will protect consumers against compulsive buying and encourage consumers to save and spend money wisely.

- "**Borrow money wisely"** debt counselling programme will sensitize consumers to borrow money wisely from reputable banks and ensure that they borrow within the budget and what they can afford to pay back to the banks.

- "**Illegal loan shark-Omashonisa"** debt counselling programme will also educate and caution consumers to only borrow from registered banks.

- "**Opt Out Registry"** the opt out registry is in terms of the amendments of the Consumer Protection Act to protect consumers from intrusive spam calls by opportunistic telemarketers. This process will provide an opportunity for registration of pre-emptive

Initials: _____

block for consumers in order to protect the consumers against telemarketers in order to ensure that consumers do not fall prey to scammers and unnecessary debts and awareness will be created to consumers to subscribe on the Opt Out registry.

The objective of the campaign is:-

- To empower consumers to make sound financial decisions and rehabilitating heavily indebted consumers.
- To create an awareness and education on basic financial literacy, consumer rights and consumer responsibilities in terms of applicable legislation, including the National Credit Act and the Consumer Protection Act.

Relevant regulators, Ombuds and other stakeholder organisations, including National Credit Regulator and applicable accredited Ombud schemes, may participate in exhibitions and edutainment roadshows to assist the consumers on matters relating to consumer credits and agreements, as well as other stakeholders which will lead to a number of presentations per day. We will be engaging various municipalities, provincial government departments and private sector companies around the KZN province to make the space available for our teams to conduct the debt counselling workshops in all 11 districts and most of them already shown a great interest in the proposed plan of action. Most of our programmes will start in peak hours to target more consumers specifically in the mornings at 9h00am and evenings at 15h00pm.

2. Purpose of the TOR

3.1. Appointment of a suitably qualified service provider to conduct Opt-Out Registry and Debt Counselling workshops for over-indebted consumers on consumer education and awareness in 11 districts of KwaZulu-Natal for a period of 36 months;

3.2. The programme is created to assist over-indebted consumers to have knowledge, skills, and ability to make appropriate financial decisions;

3.3. The programme endeavors to empower over-indebted consumers to have access to and use digital tools and platforms for financial transactions and debt counselling.

3. Project Objectives

The following deliverables and key benefits are expected in order to meet the objectives of this project. Specifically, the opt out registry and debt counselling programme will be focusing on the following particular objectives namely;

- **"Financial Literacy"** education for consumers who are heavily indebted and blacklisted with negative credit records teaching them practical ways of saving and spending money wisely. The purpose of this initiative will be to teach consumers the value of money and also to ensure that they live a simple life within their means and without incurring further debts. The intention is to ensure that consumers are groomed not to fall into the trap of living in debt and live within their financial means by being financially responsible.

- "**Loan Sharks and Loan Sharks Rescue Programme"** when consumers are not credit worthy and cannot get loans from the banks then they resort to loan sharks which put them in a debt-spiral trap for years. This programme will assist consumers in consolidating their debts at no cost.
- **"Removal of Negative Debt Listing"** the programme will assist consumers who has a credit record with judgements, defaults or traces and consumers will be assisted with the removal of these negative listings.

Initials: _____

- "**Clearance of Old & Prescribed Debt"** when consumers are not credit worthy and cannot get loans from the banks as a result of old prescribed debt. The National Credit Act 68 of 1969 states that old debt can be classified as prescribed and this programme will be assisting consumers to clear old prescribed debts.
- "**Debt Review Removal"** the programme will be assisting consumers who want to be removed from debt review without any cost from debt counsellors.

- "**Updates on Credit History and ITC Clearance**" consumers will be assisted with clearing of negative history and thereby rebuilding a positive ITC record/profile.

- **"Savings"** edutainment campaign which will encourage consumers to draft monthly budgets that will assist in curbing unnecessary spending and promote regular saving.

- "**Spending Wisely"** edutainment campaigns will be rolled out during the festive season as consumers are much known for being impulsive buyers, not being able to distinguish between the needs and the wants.

- "**Black Friday Consumer Tips**" debt counselling programme will protect consumers against compulsive buying and encourage consumers to save and spend money wisely.

- "**Borrow money wisely"** debt counselling programme will sensitize consumers to borrow money wisely from reputable banks and ensure that they borrow within the budget and what they can afford to pay back to the banks.

- "**Illegal loan shark-Omashonisa"** debt counselling programme will also educate and caution consumers to only borrow from registered banks.

- "**Opt Out Registry"** the opt out registry is in terms of the amendments of the Consumer Protection Act whereby the National Consumer Commission announced in April 2026 that amended regulations established the Opt-Out Registry system with the National Consumer Commission as the administrator supported by provincial Consumer Protectors and that the registration of direct marketers and consumers is scheduled to commence in July 2026. The aim of the Opt Out Registry is to protect consumers from intrusive spam calls by opportunistic telemarketers. This process will provide an opportunity for registration of pre-emptive block for consumers in order to protect the consumers against telemarketers in order to ensure that consumers do not fall prey to scammers and unnecessary debts.
- To provide education and awareness on pertinent financial literacy topics.
- To translate all materials and communicate to communities in IsiZulu.
- Preparation of financial literacy related material in both written and digital soft form with interesting artwork.
- The service provider is responsible for all travelling related expenses, sound and equipment and materials for workshops targeting minimum of 25 consumers in community halls

Initials: _____

- To ensure that the presentations, material and feedback adequately match the approved goals;
- To work with local municipalities for the logistical arrangements for conducting the workshops.
- To work in various locations, including cities, townships in KwaZulu Natal
- Capable of using a variety of educational styles, tools and techniques, to engage public and make the content in plain, simple, easy-to-understand language.
- The final content must be error free and visually appealing to the viewers and listeners.
- Designing the educational intervention by determining the workshop segments to be addressed and the modes of delivering training material to the various segments.
- Designing and compiling comprehensive training curriculum, tailor made for the various segments covering topics aimed at realising the objectives of the project.
- Delivering training through agreed modes per segment (i.e. workshops).

4. Scope of Work

6.1 Duration and Phasing: The duration of the project will be within a period of (36) months from the date of appointment. Reporting (including regular project monitoring and progress feedback meetings with the client) will be done on a bi-weekly basis.

6.1.1 Under the guidance and supervision of the KZN CPS Provincial Consumer Education Managers and District Consumer Education Officers, the service provider will assist the CPS in the facilitation of the Opt Out Registry and Debt Counselling workshops including the development the content and production of the financial literacy content on consumer education and awareness which will be facilitated in community halls of 11 districts.

6.1.2 The Opt Out Registry and Debt Counselling workshops must cover all 11 eleven KZN districts per month for a period of 36 months.

6.1.3 The content and production of facilitation of the Opt-Out Registry and Debt Counselling workshops will include the following services:

I. A service provider must conduct 12 Opt Out Registry and Debt Counselling workshop in 12 months for a period of 36 months by professional debt counsellors from 2026 until 2028.

II. Consumer awareness and education programmes to educate consumers of their consumer rights on financial literacy;

III. (1) Opt Out Registry and Debt Counselling workshop on financial literacy and debt review/ITC clearance to be conducted per district per month targeting 50-100 consumers per workshop.

IV. Helpdesk support service on debt review/ITC clearance must be available during the workshop to support atleast 50-100 consumers who are on debt review.

6.2 Planning and preparation work

The service provider must timeously deliver work within specific time frames cognisant of time frames, locations and the needs of the communities and department.

6.3 SPECIAL CONDITIONS

- All educational material and presentations must be original, free from unauthorised copyright.
- All work performed shall be supervised, reviewed and quality assured by suitably qualified staff of the service provider.

Initials: _____

- All working papers and reports, community attendance registers arising from work done, including, where applicable, review notes shall become the property of the Department. Such records shall be provided in both electronic format [Microsoft Word and Excel] and hard copies.
- Reports shall be provided in both printed format and editable electronic format.
- The appointed service provider should have a proven track record of delivering the required educational training and awareness creation services, particularly to local communities, but this will not preclude bidders who have not provided such services in the past, subject to such bidders certifying that they have an in-depth knowledge of the specific requirements relating to similar projects.
- POPIA regulations and measures will be implemented to protect the information of consumers

6.1 Specific Deliverables

I. Preliminary meeting with the CPS Management and other identified officials;

II. Identify relevant and effective means to ensure the specific activities and outputs are timeous, effectively and efficiently achieved; and

III. Provide a detailed Inception Report.

IV. Provide monthly report on :

a. Twelve (12) Opt Out Registry and Debt Counselling financial literacy consumer education and awareness workshops conducted per annum for 36 months.

6.2 Specific Tasks and Activities

The following specific output/outcome is expected during and on the completion of the service rendered-

I. Maintain the Opt Out Registry and Debt Counselling financial literacy workshop calendar roadshow for all 11 districts on the monthly programmes and content plans of content themes and all upcoming schedules according to the monthly calendar.

II. Prepare the content and registers on Opt Out Registry and Debt Counselling financial literacy workshops.

III. Venue, stage and sound to be provided by the service provider with refreshments for consumers (i.e. refreshments to consist of 1 x water/100% juice and 1 x fruit).

IV. Create active engagement with the audiences Opt Out Registry and Debt Counselling by ensuring that consumers are able to freely access our services and disseminate our contact details and information of the helpdesks.

V. One (12) Opt Out Registry and Debt Counselling financial literacy workshops on debt relief programme per annum for 36 months.

6.3 Duration and Phasing

The project is for a period of **36 months** with commencement date from date of signing of the service level agreement.

Initials: _____

5. The Structure and Composition of the Team

7.Team Composition

REQUIREMENTS - Skills requirement/experience

Company / consortium Experience –

The resources required to manage the service must be knowledgeable and a customer-centric task team, versed in customer services and governance policies, with the supporting management structure, to satisfy the service requirement. The service provider must ensure that they are compliant with applicable labour related legislation and be able to demonstrate sound human resource processes across the entire value chain.

Key Experts

The appointment of the Service Provider will be based on the strength of key experts' curricula vitae (CVs) that will contribute to the successful execution of the project. It is therefore imperative on the Service Provider to ensure that the Project Team comprises of individuals that will contribute to the successful execution of the project. All team members should have a proven track record of involvement in similar projects. The proposal should provide a detailed description of the Team composition and Curricula Vitae (CVs) of all Project Team members should be submitted in the attached format (Annexure 1).

Please kindly note that team members who are submitted as part of the bid must be involved in carrying out the project. Bidders must ensure that the statement of Availability Annexure C is completed per team member. Should there be a need for replacements, substitutes must be of equal caliber and prior approval must be sought from the department.

The team should comprise of –

- 1 x Team/Team leader
- 2 x Debt Counsellors registered/accredited with NCR;

The required qualifications and proof of registration for the project team and debt counsellors must be clearly highlighted in the individual CV as well as relevant references. The proposal should provide a detailed description of the CVs to be submitted in the attached format (Annexure B).

1x Team leader (Project Manager)

The Project Leader (Project Manager) Must have a qualification Degree in Accounting as a Finance Manager and be registered as a SA Chartered Accountant.

- Must have 3-5 or more years of experience in Financial Management and Project Management and the knowledge with the requirements of the Opt Out Registry by the National Consumer Commission
- Good leadership, communication skills, presentation, and report writing skills
- Knowledge and understanding of legal and regulatory measures with regard to debt counselling.
- The team leader is required for the entire duration of the project.

Initials: _____

2 x Debt Counsellors

The Counsellors successfully completed a debt counselling course approved by the National Credit Regulators or any other institution approved by the National Credit Regulator

- The Debt Counsellor must be registered with the National Credit Regulator as a Debt Counsellor and must provide proof of valid registration.
- Must have 3-5 years or more working experience in Debt Counselling/Consumer Protection and Complaints Resolution/ Consumer Advisory Services/ Legal/Paralegal Services, Accounting/Financial Services
- Experience in dealing with over-indebtedness
- Experience in rehabilitation of over-indebted consumers.
- Experience in assisting consumers to be removed from blacklisting
- Good leadership, communication skills, presentation, and report writing skills
- Fluent in IsiZulu and English;

6. ENTERPRISE EXPERIENCE AND CREDENTIALS

- Must be registered/accredited with National Credit Regulator or Financial SETA or QTCO.
- The bidder must be experienced in training and development projects and must provide 1 – 5 or more reference letters from previous clients.

The Reference Letters should reflect the information below:

Name of the Institution	Project Name	Project Description	Contact Person	Value of the contract	Duration of the contract

7. REPORTING REQUIREMENTS

The service provider is required to report to the Project Leader: CPS on any issue regarding the project.

Project Leader Director: Consumer Protection Services

Mr T A Selepe tshepiso.selepe@kznedtea.gov.za

7. BID REQUIREMENTS

10.1.Price Breakdown

In addition, as part of the Proposal/Bid Document, bidders are requested to submit a financial proposal

Item No.	Description of Service	Price per month
1	**Conducting 12 Opt Out Registry and Debt Counslling workshops per annum for 36 months**	

Initials: _____

2	**Refreshments:1 x water/100% Juice and 1 fruit per workshop for 100 consumers**	
2	**Sound system with microphones for 50-100 consumers**	
4	**Community Hall Venue hire**	
5	**Stage and decor**	
6	**50-100 chairs**	
7	**2 Tables for the main stage**	
8	If there is any additional please specify below:	
		R
		R
Total amount(excluding Vat		R
Vat (for Vat Vendor)		R
Grand Total		R

- The financial offer must be Vat Inclusive for vat vendor service providers.
- Disbursment must be calculated at 10% of project cost.

11 EVALUATION PROCESS

11.1 The Evaluation Process will be conducted in the following phases:

Phase 1	Phase 2	Phase 3	Phase 4
Administrative Compliance	**Functionality Requirement**	**Price and Preference**	**Negotiation and, Final Award**
Compliance with Mandatory Requirements.	Bidders will be assessed to verify the capacity/capability to execute the contract or the quality aspects of goods or services required.	Bids will be evaluated using the 80/20 preference points system.	Negotiation will take place with the recommended service provider if necessary, then Final award will be made.

11.1.1 PHASE 1: MANDATORY REQUIREMENTS FOR ADMINISTRATIVE COMPLIANCE

Professional body accreditation or registration for the company NCR Registration or Financial SETA OR QTCO	Valid proof of accreditation or registration letter to be attached
Professional body accreditation or registration for the Team Leader CA(SA)	Valid proof of accreditation or registration letter to be attached

Initials: _____

NCR accreditation for Debt Counsellor	Valid proof of accreditation or registration letters to be attached
CSD Registration number	The Entity must be registered as a service provider on the Central Supplier Database (CSD). If you are not registered proceed to complete the registration of your company prior to submitting your proposal.
Bidder's Disclosure – SBD 4	Completed and signed
Compulsory briefing	Briefing certificate, stamped and signed by the department's representative
Authority to Sign a Bid: COMPANIES **(To be completed in full)**	The bidder must indicate the enterprise status by ticking the appropriate box in the authority to sign. **(Details of the authorised representative and their specimen signature must be fully completed in the designated space of the form as well as details and signatures of all directors)**
Authority to Sign a Bid: SOLE PROPRIETOR (ONE – PERSON BUSINESS) **(To be completed in full)**	The bidder must indicate the enterprise status by ticking the appropriate box in the authority to sign. A director may appoint himself/herself if they will be the one signing all documents in connection with this bid and any contract resulting therefrom on behalf of the enterprise. **(Details of the authorised representative and their specimen signature must be fully completed in the designated space of the form as well as details and signatures of all directors)**

Initials: _____

Authority to Sign a Bid: CLOSE CORPORATION **(To be completed in full)**	The bidder must indicate the enterprise status by ticking the appropriate box in the authority to sign. A director may appoint himself/herself if they will be the one signing all documents in connection with this bid and any contract resulting therefrom on behalf of the enterprise. **(Details of the authorised representative and their specimen signature must be fully completed in the designated space of the form as well as details and signatures of all directors)**
Authority to Sign a Bid: CO-OPERATIVE **(To be completed in full)**	The bidder must indicate the enterprise status by ticking the appropriate box in the authority to sign. **(Details of the authorised representative and their specimen signature must be fully completed in the designated space of the form as well as details and signatures of all directors)**
Authority to Sign a Bid: JOINT VENTURE **(To be completed in full)**	The bidder must indicate the enterprise status by ticking the appropriate box in the authority to sign. **(Details of the authorised representative and their specimen signature must be fully completed in the designated space of the form as well as details and signatures of all directors)**
Authority to Sign a Bid: CONSORTIUM **(To be completed in full)**	The bidder must indicate the enterprise status by ticking the appropriate box in the authority to sign. **(Details of the authorised representative and their specimen signature must be fully completed in the designated space of the form as well as details and signatures of all directors)**
Authority to Sign a Bid: PARTNERSHIP **(To be completed in full)**	The bidder must indicate the enterprise status by ticking the appropriate box in the authority to sign. **(Details of the authorised representative and their specimen signature must be fully completed in the designated space of the form as well as details and signatures of all directors)**

Initials: _____

11.1.2 Phase 2: Functionality requirements

For bids where functionality is part of the evaluation process, they will be assessed in terms of functionality criteria stipulated hereunder. In order to progress to the next stage of evaluation, service providers must score a minimum of **60% or above** of the total points outlined in the Evaluation Grid.

EVALUATION CRITERION FOR FUNCTIONALITY:

No	Evaluation Criteria	Guidelines	Maximum Points
1	**Methodology, Strategy and Approach**	The service provider should demonstrate adherence to the Terms of Reference (TOR) by elaborating on the services required, and demonstrating whether their proposed process meets the requirements. How does the bidder envisage undertaking this project? The bidder should set out a concise and clear plan of approach and method to be adopted for the project identifying possible challenges and methods on overcoming same.	20
2	Experience of Company in execution & management of projects of a similar nature. To validate experience indicated hereunder, bidders must provide (1 – 5 or more) reference letters from the current and or previous clients.	The bidder's proven competency in rendering a similar service, extensive knowledge of the project proven by the number of years of experience in the industry Including history, group structure, operations, logistics and services and number of projects completed. 1- 5 detailed references from clients detailing the actual work completed relating to similar projects. The reference letters must be in a company's letterhead and must include the company name, Contactable references and contact numbers, duration of the contract and value of the contract.	30
3	Key Experts Qualifications, Skills and Experience	Expertise, experience / qualifications of Team leader, and support personnel to be assigned to the contract**.** Key experts required are: **Key expert 1:** Project Manager **Key expert 2:** 2 X Debt Counsellors Provide CV detailing experience and copies of qualifications of all key experts required.	50

Initials: _____

	Overall Score Total		100

11.1.3 Phase 3: Price and Preference

Bidders who obtained a minimum qualifying score of **60% or above** will progress to the next stage of price and preferential points based *on the 80/20 preference points system for acquisition of goods or services with Rand Value equal to or below R50 million or 90/10 preference points system for acquisition of goods/services with Rand Value above R50 million.*

POINTS AWARDED FOR SPECIFIC GOALS

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 the table below and may be supported by proof/ documentation stated in the same table.

Specific goals for the tender and points to be claimed are indicated in the table below:

Specific goals	**Direct Preference Points (80/20)**	**Documents required to determine specific goals respectively**
Africans	4	Completed ownership demographic form CIPC Certificate and completed SBD 6.1
Women	4	Completed ownership demographic form, CIPC Certificate and completed SBD 6.1
People with disability	4	Completed ownership demographic form, Doctor's Medical Certificate/Disability letter, and completed SBD 6.1
Youth	4	Completed ownership demographic form, CIPC Certificate Copy of Identity document and completed SBD 6.1
Geographical Location - KZN	4	Completed ownership demographic form, Utility bill letter/ letter from the ward councilor / lease agreement, and completed SBD 6.1
Total Points for development Objectives	**20**	

Financial proposals will also be assessed in terms of reasonableness of cost in relation to prevailing fee guidelines, consistency with technical bid submitted and value for money.

11.1.4 Phase 4 Final Award, Negotiation

The Department of Economic Development, Tourism and Environmental Affairs reserves the right to either NOT make an appointment and /or appoint the bidder with the highest score. The Department also reserves its right to negotiate the final price of those bids deemed technically compliant.

Initials: _____

ANNEXURE B

Evaluation Grid
To be completed for tender by each evaluator

FUNCTIONALITY – STAGE TWO OF EVALUATION

The following points will be used for scoring:

0= Not acceptable 3 = Acceptable 4 = good 5 = Excellent

Method of calculation: (Points obtained x weight ÷ 5) =

Name of the bidder: ……

Criterion	Weight at Maximum Points	Initial assessment	Final Score
Methodology, Strategy and Approach	**(20)**		
Scoring Guide • The methodology has evidence-Based Rationale more innovative and Value Addition and cover over and above all the elements in terms of the scope of work (more than 100% of the scope) = 5 points – Excellent • The methodology has clear alignment with Project Objectives, directly supports the project's goals and expected outcomes (between 80% - 100% of the scope) = 4 points – Good • Methodology with clear demonstration on how the proposed method and plan will meet the requirements of the project between 50% - 80% of the scope) = 3 points – Acceptable • Methodology with some indication on how the proposed method will meet the requirements of the project (less than 50% of the scope) and or it does not show how their proposal will meet the requirements of the project = 0 - Not acceptable.			
Experience of company in execution and management of projects of a similar nature and bidders must provide reference letters.	**(30)**		
Scoring Guide The bidder is to provide award letters/Purchase orders, and reference letters on a client's letter head stating services rendered, duration and project value; • 5 or more client reference letters = 5 - Excellent • 3-4 Client reference letters = 4 - Good • 1-2 Client reference letters = 3 - Acceptable • Zero or No Client reference letters = 0 - Not acceptable ***EDTEA reserves the right to authenticate the validity of reference letters***			
Key Expert 1 (Team Leader or Project leader): Qualification and experience	**(20)**		

Initials: _____

The Project Leader (Project Manager) Must have a qualification Degree in Accounting as a Finance Manager and be registered as a SA Chartered Accountant. The Project Leader must have 3-5 or more years of experience in Financial Management and Project Management and the knowledge with the requirements of the Opt Out Registry by the National Consumer Commission ***Scoring Guide*** • Team leader or Project manager average of 5 years or more professional experience = 5 (Excellent) • Team leader or Project manager average of 4 years professional experience = 4 (Good) • Team leader or Project manager average of 3 - years professional experience = 3 (Acceptable) • Team leader or Project manager average of less than 3 years professional experience = 0 (Not acceptable)			
Key expert 2 (Debt Counsellors - 1): Qualification and experience	**(15)**		
The Debts Counselor must have 3-5 years or more working experience in Debt Counselling/Consumer Protection and Complaints Resolution/ Consumer Advisory Services/ Legal/Paralegal Services, Accounting/Financial Services ***Scoring Guide*** • Key Expert 2 or specialist average of 5 years or more professional experience = 5 (Excellent) • Key Expert 2 or specialist average of 4 years of professional experience = 4 (Good) • Key Expert 2 or specialist average 3 years professional experience = 3 – Acceptable • Key Expert 2 or specialist average of less than 3 years professional experience = 0 (Not acceptable)			
Key expert 2 (Debt Counsellors - 2): Qualification and experience	**(15)**		
The Debts Counselor must have 3-5 years or more working experience in Debt Counselling/Consumer Protection and Complaints Resolution/ Consumer Advisory Services/ Legal/Paralegal Services, Accounting/Financial Services ***Scoring Guide*** • Key Expert 2 or specialist average of 5 years or more professional experience = 5 (Excellent) • Key Expert 2 or specialist average of 4 years of professional experience = 4 (Good)			

Initials: _____

• Key Expert 2 or specialist average 3 years professional experience = 3 – Acceptable • Key Expert 2 or specialist average of less than 3 years professional experience = 0 (Not acceptable)			
Total Evaluation Score	100%		
Minimum passing score	60%		

Evaluation performed by:

Name	
Signature	
Date	

Initials: _____

ANNEXURE C

CV FORMAT

CURRICULUM VITAE MAX 3 PAGES

Proposed role in the project:

1. **Surname:**
2. **First names:**
3. **Date of birth:**
4. **Nationality:**
5. **Civil status:**
6. **Education:**

Institution [Date from - Date to]	Qualification obtained:

7. **Language skills: Indicate competence on a scale of 1 to 5 (1 - excellent; 5 basic)**

Language	**Read**	**Speak**	**Write**

8. **Membership of professional bodies: -**
9. **Other skills: (e.g. Computer literacy, etc.)**
10. **Present position:**
11. **Years within the firm:**
12. **Key qualifications: (Relevant to the project)**

Initials: _____

13. Professional Experience

Date from -Date to	Location	Company	Position	Description of projects/responsibilities etc.

14. Other relevant information (e.g., Publications)

Initials: _____

ANNEXURE D

STATEMENT OF EXCLUSIVITY AND AVAILABILITY

Statement of exclusivity and availability

Tender ref: _____

I, the undersigned, hereby declare that I agree to participate exclusively with the tenderer _____ in the above-mentioned service tender procedure. I further declare that I am able and willing to work for the period(s) foreseen for the position for which my CV has been included.

From	To

By making this declaration, I understand that I am not allowed to present myself as a candidate to any other tenderer submitting a tender to this tender procedure. I am fully aware that if I do so, I will be excluded from this tender procedure, the tenders may be rejected, and I may also be subject to exclusion from other tender procedures and contracts funded by the KZN Department of Economic Development Tourism and Environmental Affairs.

Furthermore, should this tender be successful, I am fully aware that if I am not available at the expected start date of my services for reasons other than ill-health or *force majeure*, I may be subject to exclusion from other tender procedures and contracts funded by the KZN Department of Economic Development Tourism and Environmental Affairs and that the notification of award of contract to the tenderer may be rendered null and void.

Name	
Signature	
Date	

Initials: _____