



REQUEST FOR QUOTATION (RFQ)
RFQ NO: 044/2025/HR&OD/MENTORING/RFQ
APPOINTMENT OF A SERVICE PROVIDER TO IMPLEMENT A MENTORING PROGRAMME.

DESCRIPTION: (AS PER PROCUREMENT PLAN)	Appointment of a Service Provider to Implement a Mentoring Programme.
DURATION:	14 months
PROPOSED BID PROCESS:	RFQ
BRIEFING SESSION:	Non-Compulsory
BRIEFING SESSION DATE AND TIME:	28 January 2025 @ 11h00 a.m.
BRIEFING SESSION VENUE:	Online: Microsoft Teams Send an e-mail to tenders06@tcta.co.za to preregister and receive an invite. Registration for the briefing session will end on 27 January 2025 @16h00 p.m.
DIVISION: UNIT:	HR & OD Division
ISSUE DATE:	20 January 2025
CLOSING DATE:	07 February 2025 @ 11H00 a.m.
RFQ VALIDITY PERIOD	30 Days (from RFQ closing date)
SUBMISSION OF PROPOSALS:	tenders06@tcta.co.za
ENQUIRIES	tenders06@tcta.co.za

BACKGROUND

The Trans-Caledon Tunnel Authority (TCTA) is a state-owned entity responsible for financing and implementing bulk raw water infrastructure in South Africa. In support of Learning and Development and Talent Management strategies, TCTA seeks the services of a qualified external party to implement a mentoring programme that aligns with the CEO’s strategic focus of building a high-performance culture and fostering an agile organisation. By investing in this programme, TCTA aims to enhance the skills and capabilities of its employees, ensuring the achievement of the organisation’s overarching goals and sustaining its reputation for delivering critical bulk raw water infrastructure projects. The mentoring program will pair high-potential employees (mentees) with external subject matter experts (mentors) and equip TCTA employees to mentor interns. This initiative will complement TCTA’s coaching program by ensuring the transfer of subject matter expertise to both high-potential employees and interns

SCOPE OF WORK

DETAILED DESCRIPTION OF GOODS/SERVICES

Bidders must provide the following goods/services:

1. Develop a **project plan** for the TCTA Mentoring programme.
2. Source six (6) **experienced mentors** for nine (9) mentees. Mentors will undergo a chemistry session with the mentee to determine if the mentor is a suitable fit to the mentee. If not, additional mentor CVs shall be sourced by the bidder.
3. Deliver **two (2) training sessions** for line managers and employees assigned as mentors to interns, accompanied by an implementation guide.
4. Conducting **one (1) training session for interns** on maximizing the benefits of mentorship and effectively participating in the mentoring programme, supplemented by a support guide.
5. Provide quarterly **progress reports** and a close-out report upon conclusion of the programme.

Detailed Scope

1. Develop a Project Plan for the TCTA Mentoring Programme

The project plan shall include the programme objectives, timelines, deliverables, roles and responsibilities and methods for evaluating the success and effectiveness of the mentoring programme.

2. Source Six (6) Experienced Mentors for Nine (9) Mentees.

Mentors will undergo a process to determine if they are a suitable fit to the mentee, this includes a chemistry session. If they are found as not suitable, additional mentor profiles shall be sourced by the bidder. Once a suitable mentor with a good fit is sourced, the mentor mentee pairing will be confirmed, and mentoring can initiate.

The requirements per mentor shall include:

Mentor 1 Profile	Educational	Experience
Competence Area: Internal Auditing	NQF level 8. Member of the Institute of Internal Auditors (IIA).	<ul style="list-style-type: none"> - 10 years' experience at executive manager level. - 5 years' experience as Chief Internal Auditor. - 2 years' experience in Managing Audit Projects. - 2 years' experience in Combined Assurance - Preferably public sector experience.
Mentor 2 Profile	Educational	Experience
Competence Area: Human Resources	NQF level 9.	<ul style="list-style-type: none"> - 10 years' experience at executive manager level. - 5 years' experience as Human Resource Executive. - 2 years' experience in diversity, equity and inclusion. - 2 years' experience in transformation. - Preferably public sector experience.

SCOPE OF WORK

		<ul style="list-style-type: none"> - 5 years' private sector experience.
Mentor 3 Profile	Educational	Experience
Competence Area: Finance and Investment	NQF level 9.	<ul style="list-style-type: none"> - 10 years' experience at executive manager level. - 5 years' experience in the Finance and Investment sector (Development Finance Institutions and Banking) - 2 years' exposure in Treasury Management - (i.e., Investment, debt management, liquidity management) ideally in the infrastructure project environment.) - 2 years' experience working in a project management environment. - 2 years' experience with Financial Modelling. - Preferably public sector experience.
Mentor 4 Profile	Educational	Experience
Competence Area: Infrastructure Development	NQF level 9.	<ul style="list-style-type: none"> - 12 years' experience at executive manager level/ of which 5 years in a Chief Executive Officer/ Managing Director role. - 5 years' experience with mega projects. - 5 years' experience with cost recovery models to enable organisational sustainability.
Mentor 5 Profile	Educational	Experience
Competence Area: Environmental Sciences	NQF level 9.	<ul style="list-style-type: none"> - 8 years' experience heading the environment, social and governance (ESG) function. Ideally experience as Chief Sustainability Officer or similar. - 2 years' experience with developing an ESG/ Sustainability strategy. - 2 years' experience with developing, implementing and monitoring an ESG/Sustainability plan. - 2 years' experience with developing and implementing an Environmental and Social Management System (ESMS) in an ISO certified organisation. - Preferably public sector experience.
Mentor 6 Profile	Educational	Experience

SCOPE OF WORK

Competence Area: Financial Management (Infrastructure Development)	NQF level 8.	<ul style="list-style-type: none"> - 8 years' financial management experience in infrastructure implementation and/or operations & maintenance environment. - 2 years' experience with international tax concepts and principles. - 2 years' experience with infrastructure project financing including treasury activities. - 2 years' experience working within a project management environment with real-time project cost monitoring. - 2 years' experience working within in a multi-layer governance structure. - Preferably public sector experience.
--	--------------	---

3. Implement the Mentoring Process

- **Selection and Match Mentors:** Source the most suitable mentors with the relevant experience and expertise and match them with the mentees.
- **Chemistry Sessions:** Complete chemistry sessions to confirm the match. One mentor shall be made available for each of the nine (9) mentees. If mentors are deemed not a suitable fit to the mentee, the service provider shall source additional mentor profiles for consideration.
- **Mentoring Sessions:** Facilitate regular one-on-one mentoring sessions between mentors and mentees, including setting up a schedule and providing any necessary support. Each mentee shall receive a minimum of 1.5 mentoring a month. The process shall be completed between 6 to 12 months.
- **Support and Guidance:** Offer ongoing support to both mentors and mentees to address any issues that arise and ensure the mentoring relationships are productive and effective.
- **Feedback Mechanism:** Implement a system for collecting feedback from both mentors and mentees to continuously improve the mentoring experience.

4. Deliver Two (2) Training Sessions at TCTA's premises for Line Managers and Employees Assigned as Mentors to Interns

- **Training Content Development:** Create training material covering best practices for mentoring, effective communication, and how to support and guide interns.
- **Facilitation:** Conduct two interactive training sessions.
- **Implementation Guide:** Develop and provide an implementation guide to assist line managers and mentors in applying what they have learned and effectively carrying out their roles.

The implementation Guide shall include:

- **Purpose of Mentoring:** Define mentoring and its objectives within the context of the TCTA programme.
- **Role of Mentors:** Outline the responsibilities and expectations of mentors.
- **Building Effective Relationships:** Techniques for establishing trust and rapport with interns.

SCOPE OF WORK

- **Setting Goals:** How to work with mentees to set clear, achievable goals as per their personal development plans.
- **Effective Communication:** Strategies for providing constructive feedback, active listening, and maintaining open communication.
- **Problem-Solving and Guidance:** Approaches to assist interns in overcoming challenges and making informed decisions.
- **Understanding Intern Needs:** Recognise the common needs and developmental areas of interns.
- **Development Methods:** Methods for helping interns develop skills and competencies.
- **Templates and Worksheets:** Provide tools for setting goals, tracking progress and documenting meetings.
- **Step-by-Step Instructions:** Instructions on how to implement the mentoring process effectively.
- **Troubleshooting:** Common issues and solutions for challenges that may arise.
- **Monitoring Progress:** Techniques for assessing the effectiveness of mentoring relationships.
- **Feedback Mechanisms:** Methods for gathering and using feedback to improve mentoring practices.

5. Conduct One (1) Training Session for Interns at TCTA's premises on Maximizing the Benefits of Mentorship

- o **Training Content Development:** Develop training materials tailored to interns, focusing on how to engage effectively with their mentors, set personal goals, and take full advantage of the mentoring relationship.
- o **Facilitation:** Lead the training session, providing practical tips and strategies for successful participation in the mentoring programme.
- o **Support Guide:** Create a support guide for interns that is practical and easily accessible, ensuring that interns have the resources and knowledge needed to engage effectively in the mentoring programme.

The support guide shall include:

- **Purpose and Benefits:** Explain the goals of the mentoring programme and how interns can benefit from it.
- **Role of Mentees:** Define what is expected from interns in the mentoring relationship.
- **Setting Personal Goals:** Guidance on how to set and articulate personal and professional goals.
- **Engaging with Mentors:** Tips for proactive communication, seeking feedback, and making the most of mentoring sessions.
- **Preparation for Meetings:** How to prepare for mentoring sessions and what to bring to discussions.
- **Active Participation:** Strategies for contributing actively and engaging fully in the mentoring process.
- **Expectations Management:** Understanding and aligning expectations with mentors.
- **Templates and Worksheets:** Tools for goal setting, tracking progress, and documenting reflections.
- **Self-Evaluation:** Methods for evaluating personal growth and development.

SCOPE OF WORK

- **Providing Feedback:** How to give constructive feedback to mentors and the programme coordinators.

6. Provide Quarterly Progress Reports and a Close-Out Report Upon Conclusion of the Programme

- o **Quarterly Progress Reports:** Prepare and submit reports every quarter, highlighting progress against goals, successes, challenges, and any adjustments made to the programme.
- o **Data Collection:** Collect and analyse data on the programme's performance, including feedback from mentors, mentees, and other relevant stakeholders.
- o **Close-Out Report:** At the end of the programme, compile a close-out report summarising overall achievements, lessons learned, and recommendations for future programmes.
- o **Presentation:** Present the final report to relevant stakeholders, providing an overview of the programme's impact and outcome.

COMPANY EXPERIENCE REQUIRED

The Bidder must have worked on a minimum of two (2) Mentoring projects during period of operation. Annexure A with a minimum of two projects must be submitted. Proof of projects in the form of letter of appointments / project completion letters / contracts / progress reports / reference letters of similar work completed must be submitted.

PERSONNEL EXPERIENCE REQUIRED

PERSONNEL EXPERIENCE REQUIRED

Learning and Development Practitioner / Trainer / Facilitator

The Learning and Development Practitioner / Trainer / Facilitator should hold at least an NQF level 7 qualification in Education / Human Resources or Psychology with a minimum of eight (8) years of experience in training. The Learning and Development Practitioner / Trainer / Facilitator will also act as project lead for rolling out the mentoring programme in TCTA.

Project Coordinator

The Project Coordinator must hold at least an NQF level 5 qualification in Project Management / Coordination or Business Administration, or similar with a minimum of 3 years of experience in program management / programme coordination or project administration. The project coordinator will provide administrative, coordination, scheduling and communication support for the programme.

Six (6) Mentors

The external mentor shall leverage their subject matter expertise to offer objective guidance and help the mentee achieve their goals. The mentor shall provide tailored advice, challenge the mentee to think strategically and support skill development with their deep knowledge. By sharing their expertise and encouraging self-reflection, the mentor helps the mentee navigate complex scenarios and foster professional growth. The mentors shall meet the qualifications and experience requirement listed in the table above. Mentors will undergo a process to determine if they are a suitable fit to the mentee, this includes a chemistry session. If they are found not suitable, additional mentor profiles shall be sourced by the bidder.

DELIVERABLES

1. **One (1) project plan** for the TCTA Mentoring programme.
2. **Six (6) mentoring profiles**, one for each of the following competence areas: 1. Internal Auditing, 2. Human Resources, 3. Finance and Investment, 4. Infrastructure Development, 5. Environmental Sciences and 6. Financial Management (Infrastructure Development). Mentors will undergo a process to determine if they are a suitable fit to the mentee, this includes a chemistry session. If they are found not suitable, additional mentor profiles shall be sourced by the bidder.
3. **Hundred and sixty-two (162) mentoring hours**, eighteen (18) mentoring hours for each of the nine (9) mentees over a six (6) to twelve (12) month period.
4. **Two (2) training sessions** for line managers and employees assigned as mentors to interns, accompanied by an implementation guide. Each training session will include between 40 and 60 participants and the training duration will be one (1) day. The bidder must develop the implementation guide.
5. **One (1) training session for approximately 28 interns** on maximizing the benefits of mentorship and effectively participating in the mentoring programme, supplemented by a support guide. The bidder must develop the support guide and the training duration will be one (1) day.
6. Three (3) **quarterly progress reports**.
7. One (1) programme **close-out report**.

RETURNABLES

MANDATORY	NON-MANDATORY
<p>1. <u>COMPANY EXPERIENCE</u> Annexure A and with at least two (2) proof of projects in the form of letter of appointments / project completion letters / contracts / progress reports / reference letters of similar work completed</p> <p>No points will be awarded if <u>Annexure A</u> is not fully completed</p>	SARS Tax Compliance Tax Pin.
<p>2. <u>PROJECT PERSONNEL</u> Annexure B (B1-B2) must be fully completed and submitted.</p> <p>No points will be awarded if <u>Annexure B (B1-B2)</u> is not fully completed.</p>	CoR 14.3 - Company Registration Certificate
<p>3. <u>MENTOR PERSONNEL</u> Annexure C(C1-C6) for the following mentors:</p> <ol style="list-style-type: none"> 1. Internal Auditing, 2. Human Resources, 3. Finance and Investment, 4. Infrastructure Development, 5. Environmental Sciences and 	SCM Bidding Forms: SBD1, SBD 4 & SBD 6.1 must be

RETURNABLES	
MANDATORY	NON-MANDATORY
<p>6. Financial Management (Infrastructure Development) must be fully completed and submitted.</p> <p>No points will be awarded if <u>Annexure C(C1-C6)</u> is not fully completed.</p>	
	<p>Valid BBBEE Certificate issued by the Verification Agency accredited by SANAS, Valid DTIC BBBEE Certificate, Valid Sworn Affidavit for EME or QSE, Consolidated BBBEE for Joint Venture tenderers issued by a Verification Agency an accredited by SANAS. No points will be awarded if the bidders' Sworn Affidavit does not comply with the requirements outlined in Annexure D.</p>

PROPOSED FUNCTIONALITY CRITERIA		
TECHNICAL EVALUATION		
	Evaluation Criteria	Points
1. Company experience (10 points)		
1.1 Company Track Record and Experience	<p>The bidder must have completed a minimum of 2 mentoring projects during period of operation. Points will be allocated as follows:</p> <ul style="list-style-type: none"> • 3 or more projects completed: 10 points • 2 projects completed: 8 points <p>No points will be awarded if Annexure A is not fully completed and proof of projects in the form of letter of appointments / project completion letters or reports / contracts / progress reports or reference letters of similar work completed is not submitted.</p>	10
2. Personnel Experience (44 points)		
2.1 Learning and Development Practitioner / Trainer / Facilitator.	<p>The Learning and Development Practitioner / Trainer / Facilitator must hold an NQF level 7 qualification in Education, Human Resources or Psychology and have eight (8) years' experience in training and/or facilitation.</p> <p>Points will be allocated as follows:</p> <p><u>Years of Work Experience as a Learning and Development Practitioner / Trainer or Facilitator:</u></p> <ul style="list-style-type: none"> • 9 or more years of work experience: 6 points • 8 years of work experience: 4 points <p><u>Qualifications:</u></p> <ul style="list-style-type: none"> • NQF level 8 and above: 8 points • NQF level 7: 6 points <p>No points will be awarded if Annexure B.1 is not fully completed.</p>	14

PROPOSED FUNCTIONALITY CRITERIA

<p>2.2 Project Coordinator</p>	<p>The Project Coordinator must hold an NQF level 5 qualification with a minimum of three (3) years' experience in program management / programme coordination or project administration or similar.</p> <p>Points will be allocated as follows:</p> <p><u>Years of Work Experience as a Project Coordinator:</u></p> <ul style="list-style-type: none"> • 4 or more years of work experience: 6 points • 3 years of work experience: 4 points <p><u>Qualifications:</u></p> <ul style="list-style-type: none"> • NQF level 6 and above: 6 points • NQF level 5: 4 points <p>No points will be awarded if Annexure B.2 is not fully completed.</p>	<p align="center">12</p>																															
<p>2.3 Mentors</p>	<p>Six (6) mentor profiles, one per mentor competence area, must be provided as completed on Annexure C. The mentor profiles must meet the minimum qualification and experience requirements.</p> <p>Points will be allocated as follows:</p> <table border="1" data-bbox="427 902 1299 2054"> <tr> <td colspan="3" style="background-color: #cccccc;">Mentor 1 Profile</td> </tr> <tr> <td colspan="3" style="background-color: #cccccc;">Competence Area: Internal Auditing</td> </tr> <tr> <td style="background-color: #cccccc;">Educational</td> <td>NQF level 8. Member of the Institute of Internal Auditors (IIA).</td> <td>1 point</td> </tr> <tr> <td rowspan="3" style="background-color: #cccccc;">Experience</td> <td>10 years' experience at executive manager level.</td> <td>1 point</td> </tr> <tr> <td>- 5 years' experience as Chief Internal Auditor.</td> <td rowspan="2">1 point for meeting all requirements</td> </tr> <tr> <td>- 2 years' experience in Managing Audit Projects. - 2 years' experience in Combined Assurance</td> </tr> <tr> <td colspan="3" style="background-color: #cccccc;">Mentor 2 Profile</td> </tr> <tr> <td colspan="3" style="background-color: #cccccc;">Competence Area: Human Resources</td> </tr> <tr> <td style="background-color: #cccccc;">Educational</td> <td>NQF level 9.</td> <td>1 point</td> </tr> <tr> <td rowspan="3" style="background-color: #cccccc;">Experience</td> <td>10 years' experience at executive manager level.</td> <td>1 point</td> </tr> <tr> <td>- 5 years' experience as Human Resource Executive.</td> <td rowspan="3">1 point for meeting all requirements</td> </tr> <tr> <td>- 2 years' experience in diversity, equity and inclusion. - 2 years' experience in transformation.</td> </tr> <tr> <td>- 5 years' private sector experience.</td> </tr> </table>	Mentor 1 Profile			Competence Area: Internal Auditing			Educational	NQF level 8. Member of the Institute of Internal Auditors (IIA).	1 point	Experience	10 years' experience at executive manager level.	1 point	- 5 years' experience as Chief Internal Auditor.	1 point for meeting all requirements	- 2 years' experience in Managing Audit Projects. - 2 years' experience in Combined Assurance	Mentor 2 Profile			Competence Area: Human Resources			Educational	NQF level 9.	1 point	Experience	10 years' experience at executive manager level.	1 point	- 5 years' experience as Human Resource Executive.	1 point for meeting all requirements	- 2 years' experience in diversity, equity and inclusion. - 2 years' experience in transformation.	- 5 years' private sector experience.	<p align="center">18</p>
Mentor 1 Profile																																	
Competence Area: Internal Auditing																																	
Educational	NQF level 8. Member of the Institute of Internal Auditors (IIA).	1 point																															
Experience	10 years' experience at executive manager level.	1 point																															
	- 5 years' experience as Chief Internal Auditor.	1 point for meeting all requirements																															
	- 2 years' experience in Managing Audit Projects. - 2 years' experience in Combined Assurance																																
Mentor 2 Profile																																	
Competence Area: Human Resources																																	
Educational	NQF level 9.	1 point																															
Experience	10 years' experience at executive manager level.	1 point																															
	- 5 years' experience as Human Resource Executive.	1 point for meeting all requirements																															
	- 2 years' experience in diversity, equity and inclusion. - 2 years' experience in transformation.																																
- 5 years' private sector experience.																																	

PROPOSED FUNCTIONALITY CRITERIA

Mentor 3 Profile		
Competence Area: Finance and Investment		
Educational	NQF level 9.	1 point
Experience	- 10 years' experience at executive manager level.	1 point
	- 5 years' experience in the Finance and Investment sector (Development Finance Institutions and Banking)	1 point for meeting all requirements
	- 2 years' exposure in Treasury Management (i.e., Investment, debt management, liquidity management) ideally in the infrastructure project environment.	
	- 2 years' experience working in a project management environment.	
- 2 years' experience with Financial Modelling.		
Mentor 4 Profile		
Competence Area: Infrastructure Development		
Educational	NQF level 9.	1 point
Experience	- 12 years' experience at executive manager level/ of which 5 years in a Chief Executive Officer/ Managing Director role.	1 point
	- 5 years' experience with mega projects.	1 point for meeting all requirements
	- 5 years' experience with cost recovery models to enable organisational sustainability.	
Mentor 5 Profile		
Competence Area: Environmental Sciences		
Educational	NQF level 9.	1 point
Experience	- 8 years' experience heading the environment, social and governance (ESG) function. Ideally experience as Chief Sustainability Officer or similar.	1 point

PROPOSED FUNCTIONALITY CRITERIA

	<ul style="list-style-type: none"> - 2 years' experience with developing an ESG/ Sustainability strategy. - 2 years' experience with developing, implementing and monitoring an ESG/Sustainability plan. - 2 years' experience with developing and implementing an Environmental and Social Management System (ESMS) in an ISO certified organisation. 	1 point for meeting all requirements	
<p>Mentor 6 Profile Competence Area: Financial Management (Infrastructure Development)</p>			
	Educational	NQF level 8.	1 point
	Experience	<ul style="list-style-type: none"> - 8 years' financial management experience in infrastructure implementation and/or operations & maintenance environment. 	1 point
		<ul style="list-style-type: none"> - 2 years' experience with international tax concepts and principles. - 2 years' experience with infrastructure project financing including treasury activities. - 2 years' experience working within a project management environment with real-time project cost monitoring. - 2 years' experience working within in a multi-layer governance structure. 	1 point for meeting all requirements
No points will be awarded if Annexure C is not fully completed.			
Total points			54

Bidders who do not meet the threshold of 38 points out of the 54 points will be disqualified at the end of this stage and not evaluated further.

PROPOSED PRICING SCHEDULE

Mentoring Programme Deliverables	Unit Price (Excl. VAT)	Total Units for Contract	Total Cost (Excl. VAT)
1. One (1) project plan for the project duration.		1 project plan	
2. Hundred and sixty-two (162) mentoring hours. Eighteen (18) mentoring hours for each of the nine (9) mentees over a six (6) to twelve (12) month period.		162 mentoring hours	
3. Two (2) in-person one (1) day training sessions at TCTA's premises for line managers and employees assigned as mentors to interns. Training sessions will include between 40 and 60 participants.		2 training sessions for line managers	
4. Implementation guide for mentors.		1 implementation guide.	
5. One (1) in-person training session at TCTA's premises of one (1) day in duration for approximately 28 interns on maximizing the benefits of mentorship and effectively participating in the mentoring programme,		1 training session for Interns	
6. Intern support guide.		1 Intern support guide.	
7. Three (3) quarterly progress reports. .		3 quarterly progress reports	
8. One (1) programme close-out report.		1 close-out report	
Total Excluding Vat			
Vat @15%			
Disbursements			
Total			

The total price must be firm and unconditional.

SPECIFIC GOALS

The below table will be used to calculate the score out of 20 for preference points: -

B-BBEE Status Level of Contributor	Number of Points
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

Any bidder who fails to meet the specific goals will not be disqualified from the process and will score 0 for Specific Goals. NB - Bidders must submit valid certified copies of their B-BBEE Certificates/Sworn Affidavits which stipulates their B-BBEE Status Level of Contributor to claim preference points. Furthermore, no points will be awarded if the bidders' Sworn Affidavit does not comply with the requirements outlined in ANNEXURE D.

Preferential Points Calculation –

The weighting of the Preferential points calculation is as follows:

Price	= 80
Specific Goals	= 20
Total Score	= 100

TERMS AND CONDITIONS

TCTA'S Standard Conditions of Bid shall apply to this bid. TCTA reserves the right to cancel or not to award this bid in accordance with its standard Conditions of Bid. Bidders can obtain TCTA's standard conditions of bid upon request or on TCTA's website.

ANNEXURES

A	COMPANY EXPERIENCE
B	B1- B2: PROJECT PERSONNEL QUALIFICATIONS AND EXPERIENCE
C	C1- C6: MENTOR PERSONNEL QUALIFICATIONS AND EXPERIENCE
D	B-BBBEE SWORN AFFIDAVIT REQUIREMENTS FOR EME AND QSE
E	SBD 1 – INVITATION TO BID
F	SBD 4 – BIDDERS DISCLOSURE
G	SBD 6.1 – IN TERMS OF PPR 2022
H	SBD 7.2– CONTRACT FOR SERVICES

ANNEXURE A: COMPANY EXPERIENCE

FORM 1: COMPANY EXPERIENCE – MENTORING PROJECTS, AS PER NATSUBMITTED ATTACHED.

CLIENT NAME (The client company that services were provided to)	DESCRIBE THE PROJECT SCOPE	NAME & SURNAME OF CONTACT PERSON	DESIGNATION OF CONTACT PERSON	CONTACT DETAILS	NATURE OF PROOF SUBMITTED (SLA, Reference letter, completion letter, etc.)

NB: No points will be allocated if this table is not completed in full. No points will be allocated for self-created templates.

SIGNATURE: NAME OF BIDDER.....(of person authorised to sign on behalf of the bidder

ANNEXURE B.1: PROJECT PERSONNEL QUALIFICATIONS AND EXPERIENCE

CV TEMPLATE FOR PROJECT PERSONNEL

NOTE: ONLY ONE LEARNING AND DEVELOPMENT PRACTITIONER / TRAINER / FACILITATOR WILL BE SCORED. BIDDERS MUST SUBMIT ONLY ONE ANNEXURE B TEMPLATE FOR THIS ROLE.

B1 - QUALIFICATIONS & EXPERIENCE OF LEARNING & DEVELOPMENT PRACTITIONER / TRAINER / FACILITATOR							
Name and Surname of Resource							
Highest Academic Qualifications (Qualification name and NQF level)							
Total Relevant Year of Experience (Indicate total years of experience in training and/or facilitation for the L&D Practitioner)							
YEARS OF EXPERIENCE IN THE CAPACITY OF A LEARNING & DEVELOPMENT PRACTITIONER / TRAINER / FACILITATOR							
EMPLOYER/ CLIENT	RELEVANT EXPERIENCE	Start date (indicate the month and year)	End date (indicate the month and year)	Job Title	NAME & SURNAME OF CONTACT PERSON	DESIGNATION OF CONTACT PERSON	CONTACT DETAILS

NB: No points will be allocated if this table is not completed in full. No points will be allocated for self-created templates.

SIGNATURE: NAME OF BIDDER: (of person authorised to sign on behalf of the Bidder)

ANNEXURE B.2: PROJECT PERSONNEL QUALIFICATIONS AND EXPERIENCE

CV TEMPLATE FOR PROJECT PERSONNEL

NOTE: ONLY ONE PROJECT COORDINATOR CV WILL BE SCORED. BIDDERS MUST SUBMIT ONLY ONE ANNEXURE B TEMPLATE FOR THIS ROLE.

B2 - QUALIFICATIONS & EXPERIENCE OF PROJECT COORDINATOR							
Name and Surname of Resource							
Highest Academic Qualifications (<i>Qualification name and NQF level</i>)							
Total Relevant Year of Experience (<i>Indicate total years of experience in in program management / programme coordination or project administration.</i>)							
YEARS OF EXPERIENCE IN THE CAPACITY OF A LEARNING & DEVELOPMENT PRACTITIONER / TRAINER / FACILITATOR							
EMPLOYER/ CLIENT	RELEVANT EXPERIENCE	Start date (indicate the month and year)	End date (indicate the month and year)	Job Title	NAME & SURNAME OF CONTACT PERSON	DESIGNATION OF CONTACT PERSON	CONTACT DETAILS

NB: No points will be allocated if this table is not completed in full. No points will be allocated for self-created templates.

SIGNATURE: NAME OF BIDDER: (of person authorised to sign on behalf of the Bidder)

ANNEXURE C: MENTOR PERSONNEL QUALIFICATIONS AND EXPERIENCE

CV TEMPLATE FOR MENTORS

NOTE: ONLY ONE MENTOR PER COMPETENCE AREA WILL BE SCORED.

C1 - PROFILE COMPETENCE AREA: INTERNAL AUDITING QUALIFICATIONS AND YEARS OF EXPERIENCE							
Name and Surname of Mentor							
Highest Academic Qualifications (<i>Qualification name and NQF level</i>)							
Memberships							
EMPLOYER/ CLIENT	RELEVANT EXPERIENCE	Start date (indicate the month and year)	End date (indicate the month and year)	Job Title	NAME & SURNAME OF CONTACT PERSON	DESIGNATION OF CONTACT PERSON	CONTACT DETAILS
	10 years' experience at executive manager level.						
	5 years' experience as Chief Internal Auditor.						
	2 years' experience in Managing Audit Projects.						
	2 years' experience in Combined Assurance						

* Mentors will undergo a chemistry session with the mentee to determine if the mentor is a suitable fit to the mentee. If not, additional mentor CVs shall be sourced by the bidder.

**C2 - PROFILE COMPETENCE AREA: HUMAN RESOURCES
QUALIFICATIONS AND YEARS OF EXPERIENCE**

Name and Surname of Mentor									
Highest Academic Qualifications (<i>Qualification name and NQF level</i>)									
EMPLOYER/ CLIENT	RELEVANT EXPERIENCE	Start date (indicate the month and year)	End date (indicate the month and year)	Job Title	NAME & SURNAME OF CONTACT PERSON	DESIGNATION OF CONTACT PERSON	CONTACT DETAILS		
	10 years' experience at executive manager level.								
	5 years' experience as Human Resource Executive.								
	2 years' experience in diversity, equity and inclusion.								
	2 years' experience in transformation.								
	5 years' private sector experience.								

* Mentors will undergo a chemistry session with the mentee to determine if the mentor is a suitable fit to the mentee. If not, additional mentor CVs shall be sourced by the bidder.

**C3 - PROFILE COMPETENCE AREA: FINANCE AND INVESTMENT
QUALIFICATIONS AND YEARS OF EXPERIENCE**

Name and Surname of Mentor									
Highest Academic Qualifications (Qualification name and NQF level)									
EMPLOYER/ CLIENT	RELEVANT EXPERIENCE	Start date (indicate the month and year)	End date (indicate the month and year)	Job Title	NAME & SURNAME OF CONTACT PERSON	DESIGNATION OF CONTACT PERSON	CONTACT DETAILS		
	10 years' experience at executive manager level.								
	5 years' experience in the Finance and Investment sector (Development Finance Institutions and Banking)								
	2 years' exposure in Treasury Management (i.e., Investment, debt management, liquidity management) ideally in the infrastructure project environment.								
	2 years' experience working in a project management environment.								
	2 years' experience with Financial Modelling.								

*Mentors will undergo a chemistry session with the mentee to determine if the mentor is a suitable fit to the mentee. If not, additional mentor CVs shall be sourced by the bidder.

**C4 - PROFILE COMPETENCE AREA: INFRASTRUCTURE DEVELOPMENT
QUALIFICATIONS AND YEARS OF EXPERIENCE**

Name and Surname of Mentor							
Highest Academic Qualifications (<i>Qualification name and NQF level</i>)							
EMPLOYER/ CLIENT	RELEVANT EXPERIENCE	Start date (indicate the month and year)	End date (indicate the month and year)	Job Title	NAME & SURNAME OF CONTACT PERSON	DESIGNATION OF CONTACT PERSON	CONTACT DETAILS
	12 years' experience at executive manager level/ of which 5 years in a Chief Executive Officer/ Managing Director role.						
	5 years' experience with mega projects.						
	5 years' experience with cost recovery models to enable organisational sustainability.						

*Mentors will undergo a chemistry session with the mentee to determine if the mentor is a suitable fit to the mentee. If not, additional mentor CVs shall be sourced by the bidder.

**C5 - PROFILE COMPETENCE AREA: ENVIRONMENTAL SCIENCES
QUALIFICATIONS AND YEARS OF EXPERIENCE**

Name and Surname of Mentor							
Highest Academic Qualifications (<i>Qualification name and NQF level</i>)							
EMPLOYER/ CLIENT	RELEVANT EXPERIENCE	Start date (indicate the month and year)	End date (indicate the month and year)	Job Title	NAME & SURNAME OF CONTACT PERSON	DESIGNATION OF CONTACT PERSON	CONTACT DETAILS
	8 years' experience heading the environment, social and governance (ESG) function. Ideally experience as Chief Sustainability Officer or similar.						
	2 years' experience with developing an ESG/ Sustainability strategy.						
	2 years' experience with developing, implementing and monitoring an ESG/Sustainability plan.						
	2 years' experience with developing and implementing an Environmental and Social Management System (ESMS) in an ISO certified organisation.						

* Mentors will undergo a chemistry session with the mentee to determine if the mentor is a suitable fit to the mentee. If not, additional mentor CVs shall be sourced by the bidder.

**C6 - PROFILE COMPETENCE AREA: FINANCIAL MANAGEMENT (INFRASTRUCTURE DEVELOPMENT)
QUALIFICATIONS AND YEARS OF EXPERIENCE**

Name and Surname of Mentor							
Highest Academic Qualifications (<i>Qualification name and NQF level</i>)							
EMPLOYER/ CLIENT	RELEVANT EXPERIENCE	Start date (indicate the month and year)	End date (indicate the month and year)	Job Title	NAME & SURNAME OF CONTACT PERSON	DESIGNATION OF CONTACT PERSON	CONTACT DETAILS
	8 years' financial management experience in infrastructure implementation and/or operations & maintenance environment.						
	2 years' experience with international tax concepts and principles.						
	2 years' experience with infrastructure project financing including treasury activities.						
	2 years' experience working within a project management environment with real-time project cost monitoring.						
	2 years' experience working within in a multi-layer governance structure.						

*Mentors will undergo a chemistry session with the mentee to determine if the mentor is a suitable fit to the mentee. If not, additional mentor CVs shall be sourced by the bidder.

NB: No points will be allocated if this table is not completed in full. No points will be allocated for self-created templates.

SIGNATURE: NAME OF BIDDER: (of person authorised to sign on behalf of the Bidder)

ANNEXURE D: B-BBEE SWORN AFFIDAVIT REQUIREMENTS FOR EME AND QSE

The following information is required for the Sworn Affidavits to be valid: -

1. Name/s of deponent as they appear in the identity document and the identity number;
2. Designation of the deponent as either the director, owner or member must be indicated in order to know that person is duly authorised to depose of an affidavit;
3. Name of enterprise as per enterprise registration documents issued by the CIPC, where applicable, and enterprise business address.;
4. Percentage of black ownership, black female ownership and designated group. In the case of specialised enterprises as per Statement 004, the percentage of black beneficiaries must be reflected;
5. Indicate total revenue for the latest financial year and whether it is based on audited financial statements or management accounts;
6. Full financial year end as per the enterprise's registration documents, which was used to determine the total revenue. Example 28 February 2022;
7. B-BBEE Status level. An enterprise can only have one status level;
8. Nature of business;
9. VAT Number;
10. Date deponent signed and date of Commissioner of Oath must be the same;
11. Commissioner of Oath cannot be an employee or ex officio of the enterprise because, a person cannot by law, commission a sworn affidavit in which they have an interest;
12. Correct Sector Codes Affidavit to be used.

ANNEXURE E

SBD 1

PART A
INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)					
BID NUMBER:	044/2025/HR&OD/MENTORING/RFQ	CLOSING DATE:		CLOSING TIME:	11h00am
DESCRIPTION	APPOINTMENT OF A SERVICE PROVIDER TO IMPLEMENT A MENTORING PROGRAMME				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
tenders06@tcta.co.za					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Tefo Sekeleoane		CONTACT PERSON	Uma Hira	
TELEPHONE NUMBER	N/A		TELEPHONE NUMBER	N/A	
FACSIMILE NUMBER	N/A		FACSIMILE NUMBER	N/A	
E-MAIL ADDRESS	tenders06@tcta.co.za		E-MAIL ADDRESS	tenders06@tcta.co.za	
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
1. ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		2. ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]	
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS					
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? <input type="checkbox"/> YES					
<input type="checkbox"/> NO					
DOES THE ENTITY HAVE A BRANCH IN THE RSA? <input type="checkbox"/> YES					
<input type="checkbox"/> NO					
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO					
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA? <input type="checkbox"/>					

YES NO

IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?

YES

NO

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

**PART B
TERMS AND CONDITIONS FOR BIDDING**

3. 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).

4. 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:

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

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

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

2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise, employed by the state? YES/NO

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

Full Name	Identity Number	Name of State institution

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

2.2.1 If so, furnish particulars:

.....

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

2.3.1 If so, furnish particulars:

.....

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

.....

3 DECLARATION

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

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

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

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

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

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

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

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);

1.2 To be completed by the organ of state

a) The applicable preference point system for this tender is the 80/20 preference point system.

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price; and
- (b) Specific Goals.

1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	100

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

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

2. DEFINITIONS

- (a) "tender" means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering

process or any other method envisaged in legislation;

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

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

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

$$\begin{array}{ccc} 80/20 & \text{or} & 90/10 \\ Ps = 80 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right) & \text{or} & Ps = 90 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right) \end{array}$$

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:

$$\begin{array}{ccc} 80/20 & \text{or} & 90/10 \\ Ps = 80 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right) & \text{or} & Ps = 90 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right) \end{array}$$

Where

- Ps = Points scored for price of tender under consideration
- Pt = Price of tender under consideration
- Pmax = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
 - (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,
- then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

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

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

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

The specific goals allocated points in terms of this tender	Number of points Allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
BBBEE-LEVEL		
1	20	
2	18	
3	14	
4	12	
5	8	
6	6	
7	4	
8	2	
Non-compliant contributor	0	

DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name of company/firm.....

4.4. Company registration number:

4.5. TYPE OF COMPANY/ FIRM

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

[Tick applicable box]

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

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 - (a) disqualify the person from the tendering process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person’s conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the audi alteram partem (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution, if deemed necessary.

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

CONTRACT FORM - RENDERING OF SERVICES

THIS FORM MUST BE FILLED IN DUPLICATE BY BOTH THE SERVICE PROVIDER (PART 1) AND THE PURCHASER (PART 2). BOTH FORMS MUST BE SIGNED IN THE ORIGINAL SO THAT THE SERVICE PROVIDER AND THE PURCHASER WOULD BE IN POSSESSION OF ORIGINALLY SIGNED CONTRACTS FOR THEIR RESPECTIVE RECORDS.

PART 1 (TO BE FILLED IN BY THE SERVICE PROVIDER)

- 1. I hereby undertake to render services described in the attached bidding documents to (name of the institution)..... in accordance with the requirements and task directives / proposals specifications stipulated in Bid Number..... at the price/s quoted. My offer/s remain binding upon me and open for acceptance by the Purchaser during the validity period indicated and calculated from the closing date of the bid .
- 2. The following documents shall be deemed to form and be read and construed as part of this agreement:
 - (i) Bidding documents, viz
 - Invitation to bid;
 - Tax clearance certificate;
 - Pricing schedule(s);
 - Filled in task directive/proposal;
 - Preference claims for Broad Based Black Economic Empowerment Status Level of Contribution in terms of the Preferential Procurement Regulations 2011;
 - Declaration of interest;
 - Declaration of bidder's past SCM practices;
 - Certificate of Independent Bid Determination;
 - Special Conditions of Contract;
 - (ii) General Conditions of Contract; and
 - (iii) Other (specify)
- 3. I confirm that I have satisfied myself as to the correctness and validity of my bid; that the price(s) and rate(s) quoted cover all the services specified in the bidding documents; that the price(s) and rate(s) cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.
- 4. I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this agreement as the principal liable for the due fulfillment of this contract.
- 5. I declare that I have no participation in any collusive practices with any bidder or any other person regarding this or any other bid.
- 6. I confirm that I am duly authorised to sign this contract.

NAME (PRINT)

CAPACITY

WITNESSES	
1
2
DATE:	

SIGNATURE

NAME OF FIRM

SBD 7.2

CONTRACT FORM - RENDERING OF SERVICES

PART 2 (TO BE FILLED IN BY THE PURCHASER)

1. I..... in my capacity
as.....
accept your bid under reference numberdated.....for the
rendering of services indicated hereunder and/or further specified in the annexure(s).
2. An official order indicating service delivery instructions is forthcoming.
3. I undertake to make payment for the services rendered in accordance with the terms and
conditions of the contract, within 30 (thirty) days after receipt of an invoice.

(iv) DESCRIPTION OF SERVICE (v) SERVICE	PRICE (ALL APPLICABLE TAXES INCLUDED)	COMPLETION DATE	B-BBEE STATUS LEVEL OF CONTRIBUTION	MINIMUM THRESHOLD FOR LOCAL PRODUCTION AND CONTENT (if applicable)

4. I confirm that I am duly authorised to sign this contract.

SIGNED ATON.....

NAME (PRINT)

SIGNATURE

OFFICIAL STAMP

WITNESSES

1

....

2

