



TERMS OF REFERENCE FOR: REQUEST FOR QUOTATION FOR THE APPOINTMENT OF A SERVICE PROVIDER FOR THE EMPLOYEE WELLNESS SERVICES FOR A PERIOD OF THREE (3) YEARS FOR THE GTA.

REFERENCE NUMBER: GTA/RFQ/2026/25

Released: 13 JULY 2026

Submissions Close: 27 JULY 2026

CLOSING TIME: 16H00 pm

Queries be directed to:

Ms. Magugu Mlangeni

Supply Chain Management

Bids@gauteng.net

Submissions must be e-mailed to:

Ms. Magugu Mlangeni

Supply Chain Management

Bids@gauteng.net

1. INVITATION

- 1.2 The Gauteng Tourism Authority (GTA) hereby invites suitable service providers to submit a formal Quotation for the Employee Wellness Services for a period of three (3) years for the GTA.

2. BACKGROUND

- 2.1 The Gauteng Tourism Authority (GTA) was established in terms of the Gauteng Tourism Authority Act, Act No. 10 of 2001, to promote and support the sustainable development of tourism within Gauteng Province. Tourism is recognised as a key strategic sector in the National Tourism Sector Strategy, contributing significantly to government's efforts to address the triple challenges of unemployment, poverty, and inequality.

- 2.2 In this regard, the GTA hereby invites your firm, as part of a competitive bidding process, to submit both a technical and financial proposal for the provision and management of an Employee Wellness Programme (EWP) for a period of three (3) years.

2.3 The scope of services should include, but not be limited to, the following:

- 2.3.1 The Employee Wellness Programme must provide a confidential referral and support service administered by a certified Employee Assistance Programme (EAP) provider. The appointed service provider should be a suitably qualified and experienced specialist with a minimum of ten (10) years' experience in delivering Employee Wellness Services. The programme should address a broad range of employee wellbeing matters, including, but not limited to, psychosocial counselling, legal and financial advisory services, and health and wellness management.
- 2.3.2 GTA currently has 55 staff members, with projected growth to approximately 65 employees over the contract period. The number of employees may, however, fluctuate from time to time.

3. DELIVERABLES / KEY PERFORMANCE AREAS

The appointed service provider will be responsible for providing Health and Wellness Services as follows:

- 3.1 Implementation of an Employee Wellness Programme (EWP) to the GTA staff members that focuses on the following:

Psychological support services in relation to employees' mental, social, physical and spiritual wellbeing, including the provision of confidential counselling and referral services for the employee and the immediate family on any of the following focus areas;

3.1.1 Focus Areas:

- Bereavement and loss – individual and group support
- Family and relationship problems
- Marital problems
- Divorce
- Physical and emotional abuse
- Work related issues
- Anxiety, depression and suicidal tendencies
- Financial planning and financial difficulties
- Interpersonal communication
- Alcohol, gambling and substance abuse etc.
- To provide a minimum of 6 counselling sessions per person, per condition, per year and per family member.
- To provide multilingual, confidential, unlimited access and 24 hours, 7 days a week service
- Only professional qualified, registered clinicians and specialist will render services
- To respond within 1 hour on critical incidents
- Provide online health and wellness information to staff members.
- Provide a programme that will include an education component on lifestyle management.

3.1.2 Provide an annual programme of planned wellness activities (Provide Calendar) which include but not limited to:

- Flu vaccination
- Voluntary counseling and testing (VCT)
- Personal Health Assessments (PHA) and Personal Stress assessments (PSA)
- Health Screening (Blood pressure, Sugar levels, Cholesterol)
- Mental Health Awareness
- Cancer Screening and awareness
- Conduct HIV/AIDS Awareness Programmes (Survey Analysis) and be able to provide basic awareness and education with relevant material.
- Any other wellness initiatives deemed relevant and applicable

3.1.3 Development and Implementation of Work Life Balance programme inclusive of

- Financial fitness
- Retirement planning
- Stress and fatigue management
- Work – life balance

3.1.4 Management Training

- Comprehensive initial briefing and training sessions for managers and HR Generalists
- Training of managers on EWP case referral and management
- Management support services through management systems on absenteeism and leave management.

3.1.5 Staff Training

- Comprehensive initial briefing and training sessions for all GTA employees.
- Training of staff on optimal use of the services

3.1.6 Reporting

- Prepare and provide the Gauteng Tourism Authority management with quarterly and annual reports
- Provide feedback on issues of high risks and have potential to bear negative impact towards the organisation.
- Recommend intervention/s that will normalize wellness throughout the organization.

3.1.7 Innovation in Employee Wellness

- With the advent of the 4IR and the acceleration of technological innovation, wellness apps have gained prominence. Potential bidders are to demonstrate and provide examples of how they have used technology to provide wellness interventions and services to employees.
- Only professional qualified, registered clinicians and specialist will render services.
- To respond within 1 hour on critical incidents.

4. PRICING CONDITIONS

- 4.1 The quoted price must include all costs required for the successful delivery of the EAP services over the full 36-month (three-year) contract period and must remain fixed for the duration of the contract.

- 4.2 No additional costs will be considered unless approved through the applicable contract variation process.
- 4.3 All prices must include applicable taxes, professional fees, administration costs and any other related expenses.
- 4.4 Bidders must clearly indicate any assumptions or exclusions relating to the pricing.
- 4.5 The formal Quotation must be Inclusive of VAT in line with the following format:**

NO	FOCUS AREA	AMOUNT (R)
1.	- Bereavement and loss – individual and group support - Family and relationship problems - Marital problems - Divorce - Physical and emotional abuse - Work related issues - Anxiety, depression and suicidal tendencies - Financial planning and financial difficulties - Interpersonal communication - Alcohol, gambling and substance abuse etc. - To provide a minimum of 6 counselling sessions per person, per condition, per year and per family member - To provide multilingual, confidential, unlimited access and 24 hours, 7 days a week service - Provide online health and wellness information to staff members. - Provide a programme that will include an education component on lifestyle management.	
2.	Provide an annual programme of planned wellness activities (Provide Calendar) which include but not limited to: - Flu vaccination - Voluntary counselling and testing (VCT) - Personal Health Assessments (PHA) and Personal Stress assessments (PSA) - Health Screening (Blood pressure, Sugar levels, Cholesterol) - Mental Health Awareness - Cancer Screening and awareness - Conduct HIV/AIDS Awareness Programmes (Survey Analysis) and be able to provide basic awareness and education with relevant material. - Any other wellness initiatives deemed relevant and applicable.	
3.	Development and Implementation of Work Life Balance programme inclusive of: - Financial fitness - Retirement planning - Stress and fatigue management	

	• Work – life balance	
4.	Management Training: • Comprehensive initial briefing and training sessions for managers and HR Generalists. • Training of managers on EWP case referral and management • Management support services through management systems on absenteeism and leave management.	
5.	Staff Training: • Comprehensive initial briefing and training sessions for all GTA employees • Training of staff on optimal use of the services	
6.	Reporting: • Prepare and provide the Gauteng Tourism Authority management with quarterly and annual reports • Provide feedback on issues of high risks and have potential to bear negative impact towards the organisation. • Recommend intervention/s that will normalize wellness throughout the organization.	
TOTAL BID PRICE (FOR 3 YEARS)		R

4.6 **N.B:** Bidder must furnish the GTA with a detailed quotation / financial proposal inclusive of all costs against the above-mentioned deliverables. **Failure to provide a quotation as required above may result in the disqualification of the bid.**

4.7 All bids will first be evaluated for administrative compliance. Bidders must submit all mandatory documentation required in the bid document mention in the proposal submission (number 7).

5. FUNCTIONALITY CRITERIA EVALUATION

5.1 The proposals will be assessed according to the below functionality criteria.

5.2 The bidder must ensure that the proposal addresses each aspect of the listed criteria.

5.3 Failure to provide supporting documentation to claim points for functionality will result in no points being awarded for the specific criteria and may result in the disqualification of the bid.

FUNCTIONALITY CRITERIA	TOTAL POINTS
Important notes to the bidder: • The proposal will be evaluated in six (6) sections. • Each of the six sections has an individual score. • The six sections give a total of 100. • The six sections are as follows: ○ Section 1: Company experience with a total score of 20 points ○ Section 2: Experience on similar projects Reference letters with a total score of 20 points ○ Section 3: Qualifications of the Key Personnel with a total score of 25 points ○ Section 4: Experience of Key Personnel with a total score of 15 points ○ Section 5: Technical Approach and Methodology with a total score of 10 points ○ Section 6: Capacity and National/Provincial Footprint with a total score of 10 points	
SECTION 1: COMPANY EXPERIENCE	20
Important notes to the bidder: Company Experience - Experience in providing comprehensive Employee Assistance Programme services to public or private sector organizations, particularly organizations of similar size. Company profile listing both current and previous EAP clients. Bidders must indicate on the Company profile where the EAP services provided for both previous and current clients. • 1-5 EAP clients = 5 points • 6-8 EAP clients = 10 points • 8 or more EAP clients = 20 points (NB: previous clients should not be older than 10 yrs – July 2016). Failure to provide the information as stated above will result in no points being awarded.	
SECTION 2: EXPERIENCE ON SIMILAR PROJECTS REFERENCE LETTERS	
Important notes to the bidder: Demonstrated experience in successfully implementing and managing comparable EAP contracts over the past 10 years.	20

Signed Reference Letters in the company letterhead from the companies listed in company profile confirming EAP services rendered and details of contract completed. • 1-5 Reference letters = 5 points • 6-8 Reference letters = 10 points • 8 or more Reference letters = 20 points NB: Reference letters must be linked to the EAP clients listed in the company profile. Failure to provide the information as stated above will result in no points being awarded.	
SECTION 3: QUALIFICATIONS OF THE KEY PERSONNEL	
Important notes to the bidder: Qualifications, professional registration recognized by SAQA but not limited to, EAP Lead Psychologist, EAP Practitioners Psychologists, Trauma & Critical incident Specialists' Social Workers, Counsellors, Wellness Practitioners/Life coach and Contract management personnel assigned to the project. Certified copies of qualifications; proof of professional registration e.g. HPCSA, SABPP or SACSSP. Organisational structure indicating project team members. • Degree = 5 points • Honours = 10 points • Masters = 15 points • PHD = 25 points Failure to provide the information as stated above will result in no points being awarded.	25
SECTION 4: EXPERIENCE OF KEY PERSONNEL	
Important notes to the bidder: Experience in Employee Assistance Programme providing Counselling, Wellness Programmes and Trainings. CVs of key Personnel assigned to the project indicating years of experience. • 1-5 years' experience = 5 points • 6-8 years' experience = 10 points	15

8 or more years' experience = 15 points Failure to provide the information as stated above will result in no points being awarded.	
SECTION 5: TECHNICAL APPROACH AND METHODOLOGY	
Technical approach and Methodology - Understanding of the scope of work, implementation plan, service delivery model, quality assurance, reporting methodology, accessibility, crisis intervention, and innovation. Detailed technical proposal/methodology explaining service delivery approach; implementation plan; sample reports; quality assurance process; crisis management process; referral process; examples of wellness programmes; sample communication material = 10 points Failure to provide the information as stated above will result in no points being awarded.	10
SECTION 6: CAPACITY AND NATIONAL/PROVINCIAL FOOTPRINT	
Availability of resources, provincial coverage, call centre capability, 24/7 service availability, referral network, and ability to provide face-to-face and virtual services across Gauteng. Proof of operational call centre/after-hours support; service delivery model confirming 24/7 availability; list of offices/resources/service providers in Gauteng; referral network details; evidence of multilingual capability; confirmation of virtual counselling platforms. 24/7 Call Center Service (APP and toll-free number availability) = 10 points Failure to provide the information as stated above will result in no points being awarded.	10

6. EXPECTED SCORES

- 6.1 A bidder that fails to obtain **at least 65 points** will not be considered for further evaluation (Price and Specific Goals).

7. PROPOSAL SUBMISSION

- 7.1 Formal quotations (**inclusive of VAT**) should be accompanied by the following documents:

MANDATORY ADMINISTRATIVE COMPLIANCE DOCUMENTS (NB: FAILURE TO SUBMIT THE FOLLOWING DOCUMENTS WILL RESULT IN DISQUALIFICATION)

- **SBD 4** - Declaration of Interest Form (**Bidder's Disclosure**) completed and signed.

NON - MANDATORY ADMINISTRATIVE COMPLIANCE DOCUMENTS (NB: FAILURE TO SUBMIT THE FOLLOWING DOCUMENTS WILL NOT RESULT IN DISQUALIFICATION)

- SBD 1 – Invitation to Bid
- SBD 6.1 - Preferential Procurement Regulations 2022
- SARS PIN
- BBEE Certificate / Affidavit signed by the deponent and stamped by the Commissioner of oath.
- CSD Report
- Business Profile
- Identity document / Valid B-BBEE certificate / CSD Report
- Medical Certificate

8. INVOICES

- Payments will be made against the delivered goods / services.
- Invoices must indicate the task and/or output and should include a short description of goods delivered.
- The GTA pays for work completed to the satisfaction of the agency. No upfront payments are made for work not yet done.
- Please note that the payment can only be processed upon receipt of the following document:
 - Invoice
 - Statement reflecting the outstanding amount.
 - Proof of bank confirmation letter
- All the required documents for payment and queries should be directed to the Finance central invoice email to GTA.Invoices@gauteng.net

9. CRITERIA FOR EVALUATION OF PROPOSALS

- 9.1 Criteria for evaluation are as follows:
- The service provider will be appointed in terms of the Preferential Procurement Regulations (2022).
 - The proposal will be evaluated using the 80/20 preferential system wherein 80 represents price and 20 for specific goals.

Specific goals for this RFQ and points claimed are indicated per the table below;

SPECIFIC GOAL/S	EVIDENCE REQUIRED TO EARN POINTS	TOTAL POINTS ALLOCATION
Historically Disadvantaged individuals: • Women	Identity document / Valid B-BBEE certificate / CSD Report	5
• Youth	Identity document / Valid B-BBEE certificate / CSD Report	10
• Persons living with Disability	Medical Certificate	5
TOTAL POINTS =		20

- c) **FAILURE ON THE PART OF A TENDERER TO SUBMIT SBD 6.1 AND 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.**
- d) This RFQ is subject to the National Treasury General Conditions of Contract.

10. RULES OF BIDDING

10.1 The rules of bidding for this assignment are as follows:

- a) The GTA reserves the right to withdraw or amend these terms of reference by notice in writing to all parties who have received the terms of reference before the closing date.
- b) The GTA reserves the right to negotiate prices with the preferred / recommended bidder.
- c) The GTA reserves the right not to appoint any service provider if the received proposals do not match its requirements.
- d) Service providers may ask for clarification via email on these terms of reference or any of its annexures up to 48 hours before the deadline for the submission of the bids.
- e) Any request for Technical clarification must be directed to Nosipho@gauteng.net submitted by email and copy SCM at bids@gauteng.net and answers will be emailed to all service providers that require any clarity.
- f) The GTA reserves the right **NOT** to make an appointment for this project.
- g) The cost of preparing and submitting bids by prospective suppliers will be at the cost of the prospective supplier.
- h) The validity of the received bids shall be ninety (90) days.
- i) **No late submission will be considered after closing date and time.**
- j) The recommended bidder must be registered on the National Treasury Central Supplier Database before appointment.
- k) **For Brand name items specified in bid/quotation specification document, the bidders can quote on similar / Equivalent items.**

PART A

INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)					
BID NUMBER:	GTA/RFQ/2026/25	CLOSING DATE:	27 JULY 2026	CLOSING TIME:	16H00 pm
DESCRIPTION	REQUEST FOR QUOTATION FOR THE APPOINTMENT OF A SERVICE PROVIDER FOR THE EMPLOYEE WELLNESS SERVICES FOR A PERIOD OF THREE (3) YEARS FOR THE GTA.				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
Submissions must be emailed to Bids@gauteng.net					
No late submission will be considered after closing date and time.					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Magugu Mlangeni		CONTACT PERSON	Nosipho Masango	
TELEPHONE NUMBER	011 085 2523		TELEPHONE NUMBER	011 085 2523	
FACSIMILE NUMBER			FACSIMILE NUMBER		
E-MAIL ADDRESS	Bids@gauteng.net		E-MAIL ADDRESS	Nosipho@gauteng.net	
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
NO					
IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.					

PART B
TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:

- 1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
- 1.2. **ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED (NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.**
- 1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
- 1.4. **THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).**

2. TAX COMPLIANCE REQUIREMENTS

- 2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
- 2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
- 2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
- 2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
- 2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
- 2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
- 2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

SIGNATURE OF BIDDER:

.....

CAPACITY UNDER WHICH THIS BID IS SIGNED:

.....

(Proof of authority must be submitted e.g. company resolution)

DATE:

.....

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**

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

2.2.1 If so, furnish particulars:

.....
.....

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

2.3.1 If so, furnish particulars:

.....
.....

3 **DECLARATION**

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

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

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

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

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.

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

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

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

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

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

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

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 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:

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

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:

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

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.

SNote 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)
• Women	5	
• Youth	10	
• Persons living with Disability	5	
TOTAL POINTS =	20	

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:	