

REQUEST FOR PROPOSAL

BID NUMBER: ECIC11P-2026/27

PROVISION OF CONSUMER FINANCIAL EDUCATION SERVICES FOR THREE YEARS

CLOSING DATE: 15 DECEMBER 2026

CLOSING TIME: 11H00 (SAST, OBTAINABLE BY DIALLING TELKOM ON 1026)

Address Byls Bridge Office Park, Building 9, Fourth Floor, 11 Byls Bridge Boulevard, Highveld Extension 73, Centurion, 0157, South Africa
Tel +27 (0)12 471 3800 | **Email** info@ecic.co.za | **Website** www.ecic.co.za
Directors: Ms. DP Ndlovu (Chair), Ms. LR Seroka (CEO), Mr. S Mayekiso, Ms. SK O' Mahony, Mr. BI Mkhize, Ms. PM Mthethwa, Ms. XE Daku; Mr. W van Der Spuy, *Mr. L. Govender, Mr. S Bhanisi | Company Secretary: Ms. N Moffatt
Company registration no: 2001/013128/30 | ECIC is a licensed non-life insurer and authorised Financial Services Provider (FSP 30656). Currently exempted in terms of FAIS Notice 78 of 2019.
*alternate to Mr. W van Der Spuy
YOUR EXPORT RISK PARTNER

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A. INTRODUCTION TO THE REQUEST FOR PROPOSAL (RFP)

1. Introduction

1.1. The Export Credit Insurance Corporation of South Africa (SOC) Limited[1] (ECIC or Corporation) is a self-sustained state-owned entity listed under Schedule 3B of the Public Finance Management Act 1 of 1999 (as amended) and established in terms of the Export Credit and Foreign Investments Insurance Act 78 of 1957 (as amended).

1.2. The mandate of ECIC is to facilitate and encourage South African export trade by underwriting export credit loans and investments outside the country, to enable South African contractors to win capital goods and services contracts in countries outside South Africa. ECIC is a registered Financial Service Provider and is regulated by the Financial Sector Conduct Authority and Prudential Authority (FSP No: 30656). Currently exempted in terms of FAIS Notice 78 of 2019.

1.3. ECIC operates at the following address:

Byls Bridge Office Park
Building 9, Fourth Floor
11 Byls Bridge Boulevard
Highveld Extension 73
Centurion
0157

2. Background

2.1. The Financial Services entities operating in South Africa are legislatively required to contribute to CFE to accelerate economic transformation and financial inclusion through the Broad-Based Black Economic Empowerment (B-BBEE) Financial Sector Code (FSC).

2.2. CFE as part of the ECIC's Socio-Economic Development (SED) programme contributes to the upliftment and empowerment of the identified disadvantaged communities throughout the country by supporting sustainable SED initiatives. The initiatives are implemented together with the partners that have fostered mutually beneficial relationships with ECIC over the years.

2.3. ECIC is committed to financially support CFE programmes that improve young adults' and businesses' awareness of financial concepts and encourage good financial behaviour. For this reason, financial education will be provided to:

2.3.1. Students who are studying at institutions of higher learning.

2.3.2. Places of work where students undergo work-integrated learning or where internships take place.

2.3.3. Black small businesses in the trade and export insurance industry.

2.4. ECIC currently outsources the facilitation and implementation services of the CFE initiatives. To fund the CFE, ECIC allocates funds based on its financial performance in

[1] Further information on the ECIC can be found at www.ecic.co.za

the previous financial year. The Net Profit After Tax (NPAT) is determined after the annual audit has been concluded. The 0,4% of the 1% NPAT allocated to SED is allocated to CFE.

3. Purpose

3.1. The purpose of this Request for Proposal (RFP) is to appoint a service provider to implement and facilitate the Consumer Financial Education (CFE) Initiatives for a period of three (3) years.

4. Pre-qualification Criteria

4.1. Bidders are required to submit a copy of a valid Independent Competent Persons Report (ICPR).

4.2. The Dtic Codes of Good Practice, GUIDANCE NOTE GN000(b) define a Competent Person as “a person who has acquired through training, qualification and experience the knowledge and skills necessary for undertaking any task assigned to them under the codes”.

4.3. Whenever the Financial Sector Code is applied, the definition of a competent person shall embrace the above definition and, further to that be limited to the following persons:

4.3.1. A Chartered Accountant registered with the South African Institute of Chartered Accountants (SAICA);

4.3.2. An auditor registered in terms of the provisions of the Auditing Profession Act, 2005(IRBA);

4.3.3. An actuary who is a Fellow Member (FASSA) or an Associate Member (AMASSA) of the Actuarial Society of South Africa;

4.3.4. A verification agent accredited to audit the Financial Sector Code;

4.3.5. A legal practitioner registered as such with the Law Society of South Africa; and

4.3.6. BEE Consultants with a minimum of five years’ experience work on the Financial Sector Charter/Code.

5. Pricing

5.1. Bidders are required to provide an all-inclusive fee for the entire contract term. ECIC will not be liable for any additional costs post-award.

6. Procurement Regulations

6.1. This bid is subject to the Preferential Procurement Policy Framework Act No. 5 of 2000 and the Preferential Procurement Regulations, 2022, the General Conditions of Contract (GCC) and, if applicable, any other special conditions of contract. Where, however, the special conditions of contract conflict with the general conditions of contract, the special conditions of contract prevail.

B. TERMS OF REFERENCE

7. Scope of services

7.1. The appointed bidder will be required to:

7.1.1. Implement and facilitate ECIC's CFE initiatives targeting youth and small black-owned businesses for a period of three (3) years. The CFE initiatives must be in line with ECIC's SED strategy and the requirements of the CFE element as per the Financial Sector Code (FSC)[2] with reference to the [3]CFE Guidance Note 500 (GN500A).

7.1.2. Advocate and recruit the target audience for the CFE initiatives using various platforms i.e., social media, face-to-face workshops, virtual workshops, radio and media, etc.

7.1.3. Where possible include ECIC's identified SED beneficiaries as part of the CFE initiatives.

7.1.4. Source an independent monitoring and evaluation partner.

7.1.5. Monitor and report on financial behavioural change.

7.1.6. Arrange training venues as and when needed.

8. Bid/contract of award

8.1. The successful bidder must sign a confidentiality undertaking as part of the service level agreement.

8.2. The agreement may be terminated by the ECIC if it has reasonable grounds to do so, with not less than 30 days' prior written notice. A termination clause will form part of the agreement and may include events such as unsatisfactory performance, defining events, departure of key personnel, governance and ownership issues and reputational risks.

9. Bid/contract conditions

9.1. ECIC will enter into an agreement with successful bidder which will detail the terms of engagement. The contract will be monitored quarterly, including mandatory quarterly progress reporting on CFE initiatives.

9.2. The appointed bidder must ensure that they uphold all legislative and industry norms/regulatory requirements associated with all the functions of implementing and facilitating CFE initiatives. This includes being conversant with current and future changes in BBBEE legislation (Codes of Goods Practice) and relevant interpretations by key stakeholders.

[2] Amended Financial Sector Code published on 1 December 2017 in Government Gazette no. 41287 under section 9(1) of the B-BBEE Act (Act no. 53 of 2003.

[3] Guidance Note 500 on code series FS500, statement 500. The measurement of the consumer education element of B-BBEE: Consumer Education (GN500A – 06/03/2019) as issued by the Financial Sector Transformation Council.

10. Bid evaluation

10.1. The proposals will be evaluated in phases as highlighted below and detailed in paragraphs 10.1.1.1 and 10.1.1.2 of this document:

10.1.1. **Phase One: Pre-qualifications and compliance**

10.1.1.1. Review of the bid documents received to ensure that they are in relation to this bid. Any proposal received which is not for this bid will be considered non-compliant and will automatically be disqualified from proceeding to the next evaluation phase.

10.1.1.2. Bidders are required to submit proof of a valid Independent Competent Persons Report (ICPR).

10.1.1.3. Where a bidder fails to meet the pre-qualification criteria, the bid will be considered an unacceptable bid and will be disqualified from further evaluation.

10.1.2. **Phase Two: Functional evaluation (Desktop evaluation)**

In this evaluation phase, bidders are expected to obtain a minimum of 80 out of 100 points to proceed to the next stage of the evaluation. Failure to obtain the prescribed minimum points will automatically disqualify the bid offer from proceeding to the next evaluation phase.

10.1.3. **Phase Three: Preference point system**

The 80/20 preference point system shall be applicable to this phase, where 80 points represent the maximum obtainable points for the lowest acceptable price and 20 points represent maximum obtainable points for Specific Goals. Points will be awarded to a bidder for attaining the Specific Goals in accordance with the table as listed in the bid documentation (refer to paragraph 13, read together with the table on page 32 (paragraph 4.1).

10.1.4. **Phase Four: Objective criteria**

ECIC will apply objective criteria as detailed in paragraph 15.

11. Evaluation Phase One: Pre-qualification and compliance

11.1. Bidders are required to submit proof of a valid Independent Competent Persons Report (ICPR):

11.1.1. should be issued by a qualified independent person with at least 5 years' experience in B-BBEE and Consumer Education.

11.1.2. should include compliance to the requirements for Consumer Education as per Statement 500 of the Amended Financial Sector Codes, Guidance Note 500 as required by the Financial Sector Transformation Council [FSTC].

11.2. ECIC will only consider a bid if the relevant bidder meets the pre-qualification criteria mentioned in paragraph 11.1 Where a bidder fails to meet the prequalification criteria, the bid will be considered an unacceptable bid and will be disqualified from further evaluation.

12. Evaluation Phase Two: Functional Evaluation

12.1. The proposal submitted by prospective bidders will be evaluated by the Bid Evaluation Team based on the following criteria and will be rated as follows:

Values: 0=Poor 1=Below average, 2=Average, 3=Good, 4=Very Good, 5=Excellent

Table 1

EVALUATION CRITERIA	DESCRIPTION	FURTHER DETAIL	SUB FACTOR	SUB POINTS	POINTS
1. Capacity of the bidder	**1.1. Bidder's profile** Bidder must provide a profile detailing CFE initiatives managed (including dates or periods, funds managed per initiative, number of beneficiaries per initiative) and achievements in outsourced CFE services including industry accolades (If any). The bidder must have managed CFE initiatives in South Africa for a minimum of four years from the closing date of this bid.	1.1.1. No profile submitted.	0	20	40
		1.1.2. The Bidder provided a profile that is not comprehensive as outlined in paragraph 1.1.1 and the bidder has less than four years' experience in providing CFE initiatives in South Africa.	1-2		
		1.1.3. The Bidder provided a profile that is comprehensive as outlined in paragraph 1.1.1 and the bidder has at least four years' experience in the facilitation and implementation of CFE initiatives in South Africa.	3-5		
	1.2. Brief description of the bidder and an outline of recent (not less than 4 years) experience on assignments of a similar nature required by ECIC. For each assignment, the bidder must indicate the bidder's experience on the similar assignment, duration of the assignment, contract amount. (at least three assignments must have been undertaken and managed in South Africa together	1.2.1. No information provided.	0	10	
		1.2.2. Bidder provided less than three (3) assignments with less than three (3) contactable references as required.	1-2		
		1.2.3. Bidder provided all the required information, and the information covers at least three (3) contactable references. All information is in-line with the requirements of this bid.	3-5		

EVALUATION CRITERIA	DESCRIPTION	FURTHER DETAIL	SUB FACTOR	SUB POINTS	POINTS
	with three (3) contactable references) During evaluation of this criterion, ECIC will also verify the information provided with the clients of the bidders.				
	1.3. Human resource capacity. The bidder must have at least one lead consultant with at least five (5) years' experience in the implementation and facilitation of CFE initiatives. (Attach latest CV of the proposed professional staff). The bidder must also provide a support consultant with at least three (3) years' experience in the implementation and facilitation of the CFE initiatives (Attach latest CV of the proposed professional staff).	1.3.1. Bidder did not provide any information in relation to the lead and support consultants, or the information provided does not meet all the minimum requirements of ECIC.	0	10	
		1.3.2. Bidder provided information required in relation to the lead consultant with less than five (5) years' experience and support consultant with less than three (3) years' experience.	1-2		
		1.3.3. Bidder provided all the information required in relation to the lead consultant with at least five (5) years' experience and support consultant with at least three (3) years' experience.	3-5		
2. Portfolio/fund management	**2.1. The bidder must indicate the CFE fund size currently or previously managed.** The bidder must provide details of the total CFE fund managed. (Including CFE fund managed per client and contact details). During evaluation of this criterion, ECIC will also verify the	2.1.1. Bidder has managed a CFE fund size of less than R2 million (total fund managed) without financial statements or the bidder did not provide any of the information required.	0	20	20
		2.1.2. Bidder has managed a CFE fund size of at least R2 million (total fund managed) including financial statements as required.	1		
		2.1.3. Bidder has managed a CFE fund size of between R2 million and R5 million (total fund managed) with reviewed financial	2-4		

EVALUATION CRITERIA	DESCRIPTION	FURTHER DETAIL	SUB FACTOR	SUB POINTS	POINTS
	information provided (fund size) with the clients of the bidders. The bidder must submit copies of their last three (3) years audited or reviewed financial statements.	statements for the last three years. as required.			
		2.1.4. Bidder has managed a CFE fund size of above R5 million (total funds managed) with reviewed financial statements for the last three years.	5		
3. Process flow or methodology	3.1. The bidder must provide copy of a process flow or methodology (advocacy/recruitment) that indicates how they will identify, source and screen potential beneficiaries and implementing partners.	3.1.1. Bidder did not provide a copy of a process flow or methodology that demonstrates the identification, sourcing and screening potential beneficiaries and implementing partners as required.	0	5	10
		3.1.2. The bidder provided part of the process flow or methodology that demonstrates the identification, sourcing and screening of potential beneficiaries and implementing partners as required.	1-3		
		3.1.3. The bidder provided a copy of a process flow or methodology that comprehensively demonstrates the identification, sourcing and screening of potential beneficiaries and implementing partners as required. The information provided covers all the requirements of this evaluation criteria.	4-5		
	3.2. The bidder must provide an example of a CFE initiative implementation framework that includes a non-exhaustive list of key elements, for example, timelines, disbursements to partners/service providers,	3.2.1. Bidder did not to provide an example of a CFE initiative implementation framework.	0	5	
		3.2.2. The bidder provided an example of a CFE initiative implementation framework with a partial list of the key elements.	1-3		

EVALUATION CRITERIA	DESCRIPTION	FURTHER DETAIL	SUB FACTOR	SUB POINTS	POINTS
	reporting, meetings and monitoring, etc.	3.2.3. The bidder provided an example of a CFE implementation framework with a complete list of the key elements.	4-5		
4. CFE initiatives governance	4.1. Outline governance framework, systems and processes to ensure strategic control and risk management of the activities. Bidders are required to detail how they will manage the risks, including fund management, systems and processes in place.	4.1.1. Bidder did not provide a governance framework, systems and controls and risk management of the activities as required.	0	10	10
		4.1.2. Bidder provided information on governance, systems and controls without detailing how they will manage the risks, including fund management, systems and processes in place as required.	1-2		
		4.1.3. Bidder provided information on governance, systems and controls and partially detailed how they will manage the risks, including fund management, systems and processes in place as required.	3		
		4.1.4. The bidder provided a governance framework, systems and controls and risk management of the activities as required. The information provided comprehensively outlines the governance framework, systems and processes to ensure strategic control, risk management of the CFE initiatives with risk mitigation elements.	4-5		
5. Monitoring, evaluation and reporting	5.1. Bidders are required to outline the monitoring, evaluation and reporting processes in facilitation and implementation of the CFE initiatives.	5.1.1. Bidder did not outline the monitoring, evaluation and reporting processes as required.	0	20	20
		5.1.2. The bidder partly outlined the monitoring, evaluation and reporting processes.	1-3		

EVALUATION CRITERIA	DESCRIPTION	FURTHER DETAIL	SUB FACTOR	SUB POINTS	POINTS
	This must include monthly, quarterly, and annual reports as well as stakeholder meetings or updates.	5.1.3. The bidder outlined the monitoring, evaluation and reporting processes as required.	4-5		
TOTAL					**100**

12.2. Total points achieved under this evaluation criterion will be rounded to the nearest two decimal places.

12.3. Bidders are expected to obtain a minimum of 80 out of 100 points to proceed to the next evaluation stage of the evaluation. Failure to obtain the prescribed minimum points will automatically disqualify the bid offer from proceeding to the next evaluation phase.

13. Evaluation Phase Three: Preference point system

13.1. The formula below will be used to calculate the lowest acceptable bid price:

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

Where

Ps = Points scored for price of tender under consideration;
Pt = Comparative price of bid or offer under consideration; and
Pmin = Price of lowest acceptable tender.

13.2. Depending on the bidder's level of Specific Goals, a maximum of 20 Specific Goals points may be awarded to a bidder. The points scored by a bidder for Specific Goals will be added to the points allocated for price.

13.3. The table below reflects the number of points to be allocated to a bidder for Specific Goals:

Table 2

Specific Goals	Number of points (80/20 system)
B-BBEE Procurement Recognition Level of 135% and at least 50.1% ownership by (or combination thereof): a. Black people, or b. Black female, or c. Black Designated Group, or d. Black Voting Rights.	20
B-BBEE Procurement Recognition Level of at least 110% and at least 30% ownership by (or combination thereof): a. Black people, or b. Black female, or c. Black Designated Group, or d. Black Voting Rights.	10
B-BBEE Procurement Recognition Level of at least 110% and up to 30% ownership by (or combination thereof): a. Black people, or b. Black female, or c. Black Designated Group, or d. Black Voting Rights.	5
Any other B-BBEE Procurement Recognition Level up to 110%	0

[BIDDERS ARE REQUIRED TO INDICATE, IN ONE BLOCK, THE NUMBER OF POINTS THEY ARE CLAIMING FOR SPECIFIC GOALS ON THE TABLE ON PAGE 32 (PARAGRAPH 4.1). IN THE EVENT WHERE A BIDDER MAKES A MARK (ONE MARK), ECIC WILL CONSIDER THE CORRESPONDING POINTS TO BE THE ONE WHICH THE BIDDER IS CLAIMING. WHERE A BIDDER MAKES MULTIPLE MARKS OR DOES NOT MAKE ANY MARK OR INDICATION AT ALL

IN THE TABLE, THE BIDDER WILL BE ALLOCATED ZERO (0) POINTS FOR SPECIFIC GOALS, NOTWITHSTANDING EVIDENCE PROVIDED.]

13.4. The total points achieved under this evaluation criterion will be rounded to the nearest two decimal places.

14. Document(s) required to substantiate claims for Specific Goals

14.1. For this bid, bidders are requested to provide the following documents in substantiation for their claim of Specific Goals in line with the 2022 Preferential Procurement Regulations:

Table 3

Specific Goals	Document required to substantiate the Specific Goals claim
B-BBEE Procurement Recognition Level	Copy of a valid B-BBEE Certificate or a Copy of a valid Sworn Affidavit

14.2. Any bid received from a bidder who did not provide the document requested in this paragraph 14 shall be awarded zero points for Specific Goals.

14.3. Points for Specific Goals will be allocated as indicated in paragraph 12 of this RFP and in the SBD 6.1 Form. Bidders are required to indicate how they claim points for each preference point on the SBD6.1 Form, **in the table on page 32 (paragraph 4.1)**. In the event that a bidder does not indicate the preference points they are claiming, the bidder will be awarded zero (0) points for Specific Goals.

15. Phase Four: Objective criteria

15.1. In this evaluation stage, ECIC will check if the bidder has a person who meets the following criteria in awarding the bid:

15.1.1. The bidder has a significant shareholder or owner (or equivalent) (directly or indirectly) who is classified or can be classified as a Prominent Influential Person (PIP) per the Financial Intelligence Centre Act, 38 of 2001 (FICA).

15.1.2. The bidder has a shareholder or member or owner, or director (or equivalent) who has questionable integrity status.

15.1.3. The bidder has a director or equivalent who is classified or can be classified as a PIP by FICA.

15.2. Should it be found during this evaluation stage that the bidder who has attained the highest points under Evaluation Stage Four (Preference Point System) has persons listed in paragraphs 15.1.1 to 15.1.3, ECIC reserves the right to conduct further due diligence on the person(s). Should the outcome of a further due diligence not be satisfactory to ECIC or such a person(s) poses an unacceptable high risk reputation and/or the integrity of the person(s) be questionable, ECIC reserves the right not to award the bid to that bidder. This process may be repeated for the next bidder if so required.

16. Standard bidding documents

16.1. Bidders are required to complete and attach the following Standard Bidding Documents:

Table 4

DETAILS	REFERENCE NUMBER
Invitation to bid	SBD 1
Declaration of Interest	SBD 4
Preference Points Claim Form for Preferential Procurement Regulations 2022 **Should a bidder not complete and sign the SBD6.1, the bidder will be allocated 0.00 points for Specific Goals.**	SBD 6.1

16.2. ECIC will not award a bid to a bidder who has not submitted complete and signed Standard Bidding Documents, and the Standard Bidding Documents forms part of the condition of award.

17. Instructions to respondents

17.1. Correspondence

17.1.1. No telephonic or any other form of communication with any other ECIC member of staff other than the named individual below, relating to this RFP, will be permitted. All enquiries must be in writing only.

17.1.2. All questions relating to the contents of the tender (conditions, rules, terms of reference, etc.) must be forwarded in writing via email to procurement@ecic.co.za by not later than Tuesday, 1 December 2026. Questions received after this date will not be entertained.

17.1.3. All questions must reference specific paragraph numbers, where applicable.

17.1.4. All enquiries (received on or before the closing date for enquiries) will be consolidated and ECIC will publish one response document on the ECIC website (www.ecic.co.za) within three working days after the date indicated in paragraph 17.1.2, on or before Friday, 4 December 2026.

17.1.5. No requests for information shall be made to any other person or place, and in particular not to the existing provider of this service.

17.2. Submission of the proposals

17.2.1. Bid documents must be marked for ease of reference and be submitted in PDF format on/or before the closing date and time to the following email address:

procurement@ecic.co.za

17.2.2. The following email submission procedures or protocols must be adhered to ensure safe and secure submission of the tender documents and supporting documents:

17.2.2.1. The tender document, including the supporting or returnable documents should be submitted via email on PDF format.

17.2.2.2. If the PDF tender document, including the supporting or returnable documents is less than 20 Megabytes (MB), it should be submitted as one document. If the electronic bid document is more than 20MB, the electronic tender document should be split in order to adhered to the 20MB email capacity.

17.2.2.3. Bidders are also encouraged to submit a USB detailing their tender proposals.

17.2.3. Only if bidders are experiencing challenges with emailing documents, tenders can be delivered at the ECIC Offices on/or before the closing date and time at:

Byls Bridge Office Park
Building 9, Fourth Floor
11 Byls Bridge Boulevard
Highveld Extension 73
Centurion
0157

17.2.4. **Any proposal received after the closing date and time will not be accepted.**

17.2.5. All proposals and all subsequent information received from respondents will not be returned. The proposals should be addressed to the Head of Procurement of ECIC.

18. Timeline of the bid process

18.1. The period of validity of the tender and the withdrawal of offers, after the closing date and time, is 150 days, expiring on 14 May 2027. The project timeframes of this bid are set out below:

Table 5

STAGE	DESCRIPTION OF STAGE	ESTIMATED COMPLETION DATE (OR WORK WEEK ENDING)
1.	Advertisement of bid on the Government e-tender portal /ECIC Website	Tuesday, 24 November 2026
2.	Questions relating to the bid from the bidder(s)	Tuesday, 01 December 2026

STAGE	DESCRIPTION OF STAGE	ESTIMATED COMPLETION DATE (OR WORK WEEK ENDING)
3.	Response to the questions from the bidders	Friday, 04 December 2026
4.	Bid closing	Tuesday, 15 December 2026
5.	Compliance Evaluation	Friday, 18 December 2026
6.	Functional evaluation	Wednesday, 23 December 2026
7.	Preference Points	Wednesday, 23 December 2026
8.	Bid Adjudication	Friday, 26 February 2027

18.2. All dates and times in this bid are in South African Standard Time.

18.3. Any time or date in this bid is subject to change at the discretion of ECIC. The establishment of a time or date in this bid does not create an obligation on the part of ECIC to take any action or create any right in any way for any bidder to demand that any action be taken on the date established. The bidder accepts that, if ECIC extends the deadline for bid submission (the Closing Date) for any reason, the requirements of this bid otherwise apply equally to the extended deadline.

18.4. ECIC will notify all bidders of the outcome of the bid within 10 days from the date of acceptance of bid by the identified bidder.

19. Bid rules

19.1. **Awarding a bid**

19.1.1. ECIC will not award a bid to a bidder:

19.1.1.1. Who is or the bidder's director(s), trustee(s), shareholder(s), member(s), partners(s) or any person(s) having controlling interest in the bidder are restricted from conducting business with the State.

19.1.1.2. Who is in the employ of the State or has a director(s), trustee(s), shareholder(s), member(s), partners(s) or any person(s) having controlling interest in the bidder who is in the employ of the State as contemplated in the Public Administration Management Act, 11 of 2014 and is prohibited from conducting business with the State in terms of section of PAMA.

19.1.1.3. Who is in the service of the State or has a director(s), trustee(s), shareholder(s), member(s), partners(s) or any person(s) having controlling interest in the bidder and has not declared their business interest as required in the applicable SBD4 form.

19.1.1.4. Has been found to have transgressed Prevention and Combating of Corrupt Activities Act,12 of 2004 (as amended).

19.1.1.5. Has been found to have transgressed or is transgressing the Competition Act, 89 of 1998 (as amended).

19.1.2. ECIC shall not award a bid or contract or order to a bidder whose tax affairs are not compliant, except to foreign bidders with no tax obligations in South Africa.

19.1.3. For a bidder or the bidder's director(s), trustee(s), shareholder(s), member(s), partners(s) or any person(s) having controlling interest in the bidder who have declared their business interest as required in the applicable SBD4 form, ECIC will not award a bid to a bidder who has declared their interest and:

19.1.3.1. Is prohibited from conducting business with the State; or

19.1.3.2. Does not have permission to conduct remunerative work outside their employment.

19.1.4. ECIC will verify with the relevant Organ of State to determine if paragraphs 19.1.3.1 and 19.1.3.2 are not applicable.

19.1.5. ECIC will assume that the person contemplated in paragraph 19.1.1.3 is prohibited from conducting business with the State, or the person does not have permission to conduct remunerative work outside their employment, if it does not receive any response within 21 days from such verification request to an Organ of State.

19.1.6. ECIC will then recommend awarding the bid to the bidder who achieved the second highest preference points, and should it be established that, the bidder who achieved the second highest preference points have a person contemplated in paragraph 19.1.1.3, ECIC will conduct verification as contemplated in paragraphs 19.1.1.4 and. This step can be performed to up to the bidder who achieved the third highest preference points.

19.2. **Documents/information required as a condition of award**

19.2.1. Proof of valid registration on the National Treasury Central Supplier Database (CSD).

19.2.2. Completed and signed Standard Bidding Forms as follows:

Table 6

Invitation to bid (all bidders must ensure that this Form is duly completed and signed)	SBD 1
Declaration of Interest	SBD 4
Preference Points Claim Form	SBD 6.1

19.3. **Sub-contracting**

19.3.1. ECIC fully endorses the South African Government's transformation and empowerment objectives and in awarding the tender or contract, preference may be given to bidders (Generics) who are willing to subcontract not less than 30% of the contract to a company which is Black Owned, Black Women Owned, Black Youth Owned, owned by Black People with Disabilities, an EMEs and QSE. EME's and QSE's are allowed to bid without subcontracting.

19.3.2. If contemplating subcontracting, please note that a bidder will not be awarded points for Specific Goals if it is indicated in its Proposal that such bidder intends subcontracting more than 30% (thirty percent) of the value of the contract to an entity/entity that do not qualify for at least the same points that the bidder qualifies for, unless the intended subcontractor is a company which is Black Owned, Black Women Owned, Black Youth Owned, owned by Black People with Disabilities, an EME and QSE , with the capability to execute the subcontract.

19.3.3. A person awarded a contract may not subcontract more than 25% (twenty five) of the value of the contract to any other enterprise that does not have an equal or higher Specific Goals than the person concerned, unless the contract is subcontracted to an EME that has the capability and ability to execute the subcontract.

19.4. **ECIC's rights**

19.4.1. ECIC reserves the right to:

19.4.1.1. Amend any bid conditions, bid validity period, bid specifications, or extend the bid closing date, all before the bid closing date. Such amendments will be posted on the ECIC's website under the relevant tender information. All prospective bidders must therefore ensure that they visit the website of ECIC (www.ecic.co.za) regularly before they submit their bid response to ensure that they are kept updated on any amendments in this regard.

19.4.1.2. Cancel or withdraw this bid at any time, as a whole or in part without reasons and without attracting any liability.

19.4.1.3. Award this bid to more than one bidder.

19.4.1.4. Award this bid in total or part.

19.4.1.5. Negotiate with all or some of the shortlisted bidders.

19.4.1.6. Not accept the lowest priced bid or award the bid to a bidder other than the highest scoring bidder.

19.4.1.7. Conduct site visits at bidder's offices and / or at client sites if so required.

19.4.1.8. Request any relevant information and/ or documents to verify or clarify information supplied in the bid response in relation, but not limited, to the structure of the bidding entity, bidder's capacity, proposed solution, proposed timelines etc.

19.5. **Contract fees**

Where a bidder indicates that its prices are subject to confirmation, or are in any way conditional, such pricing will not be considered.

19.6. **Confidentiality**

Any information relating to the submissions, through the process or otherwise shall be treated in strict confidence. In submitting a response, a Service provider agrees that it shall not be entitled to any information disclosed by another respondent to ECIC, which ECIC has determined to be of a confidential nature. The content and details of the evaluation of submissions will remain confidential to ECIC.

19.7. **Other matters**

19.7.1. If the ECIC does not accept any proposal, it will declare this bid process closed and may then elect to:

19.7.1.1. Proceed on a completely different basis; and/or

19.7.1.2. Not to appoint any respondent (in the event it deems all or any of the proposals not appropriate).

19.7.2. The ECIC reserves the right to engage in any processes required to validate all claims made in the proposal.

19.7.3. The ECIC has the right to enter into negotiation with a prospective Service provider regarding any terms and conditions, including fees, of a proposed contract.

19.8. **Disclaimer**

19.8.1. The ECIC has produced this bid in good faith. However, the ECIC, its agents and its employees and associates, do not warrant its accuracy or completeness. The ECIC will not be liable for any claim whatsoever and howsoever arising (including, without limitation, any claim in contract, negligence or otherwise) for any incorrect or misleading information contained in this bid due to any misinterpretation of this bid.

19.8.2. This bid is a request for proposals only and not an offer document; answers to it must not be construed as acceptance of an offer or imply the existence of a contract between the ECIC and the bidder.

19.9. **Terms of engagement**

The ECIC's engagement of the service provider will be documented in a contract between the ECIC and the appointed bidder.

ANNEXES

Annexure A: Protection of personal information

1. ECIC recognises that when the Bidder submit its proposal in response to this Request for Quotations, it will provide personal information, which ECIC will process for the sole purpose of evaluating the Bidder's proposal. By submitting its proposal in responding to this Request for Quotations, the Bidder hereby provide its consent to the processing of its Personal Information by ECIC.

2. The following terms shall have the meaning ascribed to them:

    2.1. "**Personal Information**" shall bear the same meaning as ascribed to it under POPI;

    2.2. "**POPI**" means Protection of Personal Information Act, No. 4 of 2013;

    2.3. "**Responsible Party**" shall bear the same meaning as ascribed to it under POPI; and

    2.4. "**bid**" means this Request for Quotations.

3. ECIC as the Responsible Party undertakes to:

    3.1. comply with the provisions of POPI as well as all applicable legislation as amended or substituted from time to time;

    3.2. treat all Personal Information strictly as defined within the parameters of POPI;

    3.3. process Personal Information only in accordance with the consent it was obtained for, for the purpose agreed, as permitted by law;

    3.4. secure the integrity and confidentiality of any Personal Information in its possession or under its control by taking appropriate, reasonable technical and organisational measures to prevent loss, damage, unauthorised destruction, access, use, disclosure or any other unlawful processing of Personal Information;

    3.5. not transfer any Personal Information to any third party in a foreign country unless such transfer complies with the relevant provisions of POPI regarding transborder information flows; and

    3.6. not retain any Personal Information for longer than is necessary for achieving the purpose in terms of bid or in fulfilment of any other lawful requirement.

4. ECIC will ensure that all reasonable measures are taken to:

    4.1. identify reasonably foreseeable internal and external risks to the Personal Information in its possession or under its control;

    4.2. establish and maintain appropriate security safeguards against the identified risks;

4.3. regularly verify that the security safeguards are effectively implemented;

4.4. ensure that the security safeguards are continually updated in response to new risks or deficiencies in previously implemented safeguards;

4.5. provide immediate notification to the Bidder if a breach in information security or any other applicable security safeguard occurs; provide immediate notification to the Bidder where there are reasonable grounds to believe that the Personal Information has been accessed or acquired by any unauthorised person;

4.6. remedy any breach of a security safeguard in the shortest reasonable time and provide the Bidder with the details of the breach and, if applicable, the reasonable measures implemented to address the security safeguard breach;

4.7. provide immediate notification to the Bidder where the Bidder has, or reasonably suspects that, Personal Information has been processed outside of the purpose agreed to or consented to;

4.8. provide the Bidder, upon request, with all information of any nature whatsoever relating to the processing of the Personal Information for the purpose of the bid and any applicable law; and

4.9. notify the Bidder, if lawful, of receipt of any request for access to Personal Information, in its possession and relating to the Bidder.

5. The Bidder has the right to inspect the Personal Information processing operations, as well as the technical and organisational information security measures employed by the ECIC to ensure compliance with the provisions of this Annexure.

Annexure B: Format for fee proposal (Pricing Example)

This page has been left blank intentionally. Refer to the attached document titled Annexure B (Format for fee proposal (Pricing Example)).

APPLICABLE STANDARD BIDDING DOCUMENTS

SBD 1

PART A
INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE EXPORT CREDIT INSURANCE CORPORATION OF SOUTH AFRICA					
BID NUMBER:	ECIC11P-2026/27	**CLOSING DATE:**	15 DECEMBER 2026	**CLOSING TIME:**	11:00
DESCRIPTION	**PROVISION OF CONSUMER FINANCIAL EDUCATION SERVICES FOR THREE YEARS**				

BID RESPONSE DOCUMENTS MUST BE SENT TO THE FOLLOWING EMAIL ADDRESS:			
Preferably via email: procurement@ecic.co.za			
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO		**TECHNICAL ENQUIRIES MAY BE DIRECTED TO:**	
CONTACT PERSON	Lulama Makwela	CONTACT PERSON	Lulama Makwela
E-MAIL ADDRESS	procurement@ecic.co.za	E-MAIL ADDRESS	procurement@ecic.co.za

SUPPLIER INFORMATION						
NAME OF BIDDER						
POSTAL ADDRESS						
STREET ADDRESS						
TELEPHONE NUMBER	CODE		NUMBER			
CELL PHONE NUMBER						
FACSIMILE NUMBER	CODE		NUMBER			
E-MAIL ADDRESS						
VAT REGISTRATION NUMBER						
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA	
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	Yes No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?		Yes No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]	

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

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

PART B
TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:
1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
1.2. **ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED– (NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.**
1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
~~1.4. **THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).**~~
2. TAX COMPLIANCE REQUIREMENTS
2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

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

SIGNATURE OF BIDDER: ……

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

DATE: ……

SBD 4

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

1.1. 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.

1.2. 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 interest1F[4] 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

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

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

2.2.1. If so, furnish particulars:

Full Name (Name of person employed by Export Credit Corporation of South Africa (SOC) Ltd, the procuring institution)	Relationship

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:

Name of Related Enterprise	Registration (ID) Number

3. DECLARATION

I, the undersigned, 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 consortium2F[5] 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.

3.5. The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

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

3.7. I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act 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.

[5] 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.

Name of declarer			
Position/Title of declarer			
Name of bidder			
Signature of declarer		Date of signature	

SBD 6.1

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

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

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

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1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

1.1.1 the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and

1.1.2 the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 To be completed by the organ of state
(*delete whichever is not applicable for this tender*).

~~1.2.1 The applicable preference point system for this tender is the 90/10 preference point system.~~

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

~~1.2.3 Either the 90/10 or 80/20 preference point system will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.~~

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

1.3.1 Price; and

1.3.2 Specific Goals.

1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80.00
SPECIFIC GOALS	20.00
TOTAL POINTS FOR PRICE AND SPECIFIC GOALS	**100.00**

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

2.1 **"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;

2.2 **"price"** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;

2.3 **"rand value"** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

2.4 **"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

2.5 **"the Act"** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1 POINTS AWARDED FOR PRICE

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

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

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

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

Where
Ps = Points scored for price of tender under consideration
Pt = Price of tender under consideration
Pmin = Price of lowest acceptable tender

~~**3.2 FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT**~~

~~**3.2.1 POINTS AWARDED FOR PRICE**~~

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

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

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

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

4. POINTS AWARDED FOR SPECIFIC GOALS

4.1 In terms of Regulation 4(2); 5(2); 6(2), and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for Specific Goals stated in the tender. For the purposes of this tender, the tenderer will be allocated points based on the goals stated in Table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:

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) (Select or tick or indicate or place a mark in one block only)
B-BBEE Procurement Recognition Level of 135% and at least 50.1% ownership by (or combination thereof): a. Black people, or b. Black female, or c. Black Designated Group, or d. Black Voting Rights.	20	
B-BBEE Procurement Recognition Level of up to 135% and at least 30% owned by (or combination thereof): a. Black people, or b. Black female, or c. Black Designated Group, or d. Black Voting Rights.	10	
B-BBEE Procurement Recognition Level of between 110% and 135% with up to 30% ownership by (or combination thereof): a. Black people, or b. Black female, or c. Black Designated Group, or d. Black Voting Rights.	5	
Any other B-BBEE Procurement Recognition Level up to 110%.	0	

[BIDDERS ARE REQUIRED TO INDICATE, IN ONE BLOCK, THE NUMBER OF POINTS

THEY ARE CLAIMING FOR SPECIFIC GOALS IN THE TABLE ABOVE. IN THE EVENT WHERE A BIDDER MAKES A MARK (ONE MARK), ECIC WILL CONSIDER THE CORRESPONDING POINTS TO BE THE ONE WHICH THE BIDDER IS CLAIMING FOR. WHERE A BIDDER MAKES MULTIPLE MARKS OR DOES NOT MAKE ANY MARK OR INDICATION AT ALL IN THE TABLE, THE BIDDER WILL BE ALLOCATED ZERO (0) POINTS FOR SPECIFIC GOALS, NOTWITHSTANDING THE EVIDENCE PROVIDED.].

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—

4.2.1 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

4.2.2 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.

DECLARATION WITH REGARD TO COMPANY/FIRM

NAME OF COMPANY/FIRM	
COMPANY REGISTRATION NUMBER (ID NUMBER)	

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

4.3 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:

4.3.1 The information furnished is true and correct;

4.3.2 The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;

4.3.3 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;

4.3.4 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 –

4.3.4.1 disqualify the person from the tendering process;

4.3.4.2 recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;

4.3.4.3 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;

4.3.4.4 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

4.3.4.5 forward the matter for criminal prosecution, if deemed necessary.

NAME OF TENDERER	
NAME AND SURNAME (AUTHORISED SIGNATORY)	
SIGNATURE	
ADDRESS	
DATE OF SIGNATURE	

Annexure D: Checklist

Hereunder is a checklist to ensure that the bid document is complete in terms of administrative compliance. Please ensure that the following forms have been completed and signed and that all documents, as requested, are attached to the tender document.

ITEM	DOCUMENT REFERENCE		ACTION TO BE TAKEN	YES/ NO
1.	SBD 1	Invitation to bid	Is the form duly completed and signed?	
2.	Company profile		Has the bidder provided a company profile?	
3.	SBD 4	Declaration of Interest	Is the form duly completed and signed?	
4.	SBD 6.1	Preference Points Claim Form for Preferential Procurement Regulations 2022	Is the form duly completed, Specific Goals points claimed, and the form signed? Refer to **the table on page 32 (paragraph 4.1).**	
5.	B-BBEE status level verification certificate or Sworn Affidavit		Is proof of the B-BBEE Status level of the contributor attached? Bidder must attach a copy of the B-BBEE Certificate or a copy of the Sworn Affidavit, whichever is applicable.	
6.	CSD Report or MAAA Number			
7.	Company profile			
8.	Proof of a valid Independent Competent Persons Report (ICPR)			
9.	Copies of audited or reviewed financial statements (for the past three years from the closing date of the bid)			
10.	Quotation (indicating fees to be charged in percentage terms)			
11.	Tender submission (if the bidder is submitting physical information/ documents)		Two (2) printed copies (one original and one copy) submitted? (if submitting physical copies)	
			One (1) electronic copy submitted?	

I, the undersigned (name) ……..…… certify that the information furnished on this checklist is true and correct.

Position/Title of declarer			
Name of bidder			
Signature of declarer		Date of signature	