



|                                 |   |                                               |
|---------------------------------|---|-----------------------------------------------|
| <b>SPECIFICATIONS ENQUIRIES</b> | : | <b>Gershon Oliver</b>                         |
| <b>TEL NO.</b>                  | : | <b>(021) 483 9497</b>                         |
| <b>BID ENQUIRIES</b>            | : | <b>Ganeefah Abrahams</b>                      |
| <b>TEL NO.</b>                  | : | <b>(021) 483 8130</b>                         |
| <b>BID NO.</b>                  | : | <b>EDT 003-2025</b>                           |
| <b>CLOSING DATE</b>             | : | <b>18 November 2025 @ 11:00</b>               |
| <b>VALIDITY PERIOD</b>          | : | <b>90-DAYS (CALCULATED FROM CLOSING DATE)</b> |

**Service: ESTABLISHMENT OF A PANEL OF RESEARCHERS ON ECONOMIC DEVELOPMENT PLANNING THREE (3) YEAR PERIOD**

1. Bidders are invited to submit their applications for the Establishment of a Panel of Researchers on Economic Development Planning for a period of three (3) years according to the attached Terms of Reference (ToR).
2. This bid is subject to the General Conditions of Contract (GCC) and, where applicable, any other special conditions of contract.
3. Kindly note that the Bid applications **MUST** be submitted via e-Tender Portal:
- 3.1 **SEE GUIDE BELOW ON HOW TO SUBMIT A RESPONSE ON THE E-TENDER PORTAL**

**Submit on E tender portal, following the below:**

1. (<https://www.etenders.gov.za/>)
2. Search/Click Browse Opportunities by organ of state (Economic Development and Tourism) / search by Tender reference number.
3. Click the + sign to expand the tender / RFQ information.
4. Start the e-submission process.
5. Supplier login
6. Use your CSD Credentials to Login. Contact CSD on ([csd@treasury.gov.za](mailto:csd@treasury.gov.za)) in case you forgot your login credentials. "My profile should show if you have logged in successfully".
7. Select supplier.
8. Check the submission checklist and attached the compulsory documents.
9. Confirm and proceed.
4. **If the application is not going through on the E-tender portal Contact:**  
eTenders Contact Centre  
+27(0)12 406 9222 / 012 406-9229 / 012 312-5000  
[etenders@treasury.gov.za](mailto:etenders@treasury.gov.za)  
<https://etenders.treasury.gov.za>
5. Bids forwarded by e-mail or similar process, will not be considered.
6. **Important Note:**  
Bidders are strongly advised to complete their electronic submissions at least one day before the closing date. This helps avoid last-minute technical issues that may arise due to slow internet, limited bandwidth, or large file uploads. Please do not wait until the final hour to submit your bid, as late submissions will not be accepted by the system.

7. All bids must be submitted on the original forms – **(BIDDERS MUST NOT RE-TYPE THE BID DOCUMENT OR CONVERT FROM PDF FORMAT)**

Trevor Malgas  
(55569544)

Digitally signed by Trevor  
Malgas (55569544)  
Date: 2025.10.17 09:56:16  
+02'00'

For **ACCOUNTING OFFICER: ECONOMIC DEVELOPMENT AND TOURISM**  
**DATE:**

## PART A INVITATION TO BID

### ZERO-TOLERANCE TO FRAUD, THEFT AND CORRUPTION (ANTI-FRAUD, THEFT AND CORRUPTION)

THE WCG IS COMMITTED TO GOVERN ETHICALLY AND TO COMPLY FULLY WITH ANTI-FRAUD, THEFT AND CORRUPTION LAWS AND TO CONTINUOUSLY CONDUCT ITSELF WITH INTEGRITY AND WITH PROPER REGARD FOR ETHICAL PRACTICES.

THE WCG HAS A ZERO TOLERANCE APPROACH TO ACTS OF FRAUD, THEFT AND CORRUPTION BY ITS OFFICIALS AND ANY SERVICE PROVIDER CONDUCTING BUSINESS WITH THE WCG.

THE WCG EXPECTS ALL ITS OFFICIALS AND ANYONE ACTING ON ITS BEHALF TO COMPLY WITH THESE PRINCIPLES TO ACT IN THE BEST INTEREST OF THE WCG AND THE PUBLIC AT ALL TIMES.

THE WCG IS COMMITTED TO PROTECTING PUBLIC REVENUE, EXPENDITURE, ASSETS AND REPUTATION FROM ANY ATTEMPT BY ANY PERSON TO GAIN FINANCIAL OR OTHER BENEFIT IN AN UNLAWFUL, DISHONEST OR UNETHICAL MANNER.

INCIDENTS AND SUSPICIOUS ACTIVITIES WILL BE THOROUGHLY INVESTIGATED AND WHERE CRIMINAL ACTIVITY IS CONFIRMED, RESPONSIBLE PARTIES WILL BE PROSECUTED TO THE FULL EXTENT OF THE LAW.

|                                                                                                                                                                       |                                                                                                                 |               |                                                |                                                                                          |                                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------|---------------|------------------------------------------------|------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|
| <b>YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)</b>                                                                      |                                                                                                                 |               |                                                |                                                                                          |                                                                                   |
| BID NUMBER:                                                                                                                                                           | EDT 003-25                                                                                                      | CLOSING DATE: | 18 NOVEMBER 2025                               | CLOSING TIME:                                                                            | 11:00 AM                                                                          |
| DESCRIPTION                                                                                                                                                           | <b>ESTABLISHMENT OF A PANEL OF RESEARCHERS ON ECONOMIC DEVELOPMENT PLANNING FOR A PERIOD OF THREE (3) YEARS</b> |               |                                                |                                                                                          |                                                                                   |
| <b>BID RESPONSE DOCUMENTS MUST SUBMITTED VIA THE E-TENDER PORTAL</b>                                                                                                  |                                                                                                                 |               |                                                |                                                                                          |                                                                                   |
| To be submitted via e-tender portal for <u>Department: Economic Development and Tourism</u> - <a href="https://www.etenders.gov.za/">https://www.etenders.gov.za/</a> |                                                                                                                 |               |                                                |                                                                                          |                                                                                   |
| <b>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO</b>                                                                                                                 |                                                                                                                 |               | <b>TECHNICAL ENQUIRIES MAY BE DIRECTED TO:</b> |                                                                                          |                                                                                   |
| CONTACT PERSON                                                                                                                                                        | Ms Ganeefah Abrahams                                                                                            |               | CONTACT PERSON                                 | Mr Gershon Oliver                                                                        |                                                                                   |
| TELEPHONE NUMBER                                                                                                                                                      | (021) 483 8130                                                                                                  |               | TELEPHONE NUMBER                               | (021) 483 9497                                                                           |                                                                                   |
| FACSIMILE NUMBER                                                                                                                                                      | N/A                                                                                                             |               | FACSIMILE NUMBER                               | N/A                                                                                      |                                                                                   |
| E-MAIL ADDRESS                                                                                                                                                        | <a href="mailto:Ganeefah.Abrahams@westerncape.gov.za">Ganeefah.Abrahams@westerncape.gov.za</a>                  |               | E-MAIL ADDRESS                                 | <a href="mailto:Gershon.Oliver@westerncape.gov.za">Gershon.Oliver@westerncape.gov.za</a> |                                                                                   |
| <b>SUPPLIER INFORMATION</b>                                                                                                                                           |                                                                                                                 |               |                                                |                                                                                          |                                                                                   |
| 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:                                                                                      |               | AND                                            | CENTRAL SUPPLIER DATABASE No:                                                            | MAAA                                                                              |
| B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE                                                                                                                          | [TICK APPLICABLE BOX]<br><input type="checkbox"/> Yes <input type="checkbox"/> No                               |               | B-BBEE STATUS LEVEL SWORN AFFIDAVIT            |                                                                                          | [TICK APPLICABLE BOX]<br><input type="checkbox"/> Yes <input type="checkbox"/> No |

|                                                                                                                                                                                                                            |                                                                                       |                                                                                 |                                                                                                      |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|---------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------|
| IF YES, WAS THE CERTIFICATE ISSUED BY A VERIFICATION AGENCY ACCREDITED BY THE SOUTH AFRICAN NATIONAL ACREDITATION SYSTEM (SANAS)                                                                                           | [TICK APPLICABLE BOX]<br><br><input type="checkbox"/> Yes <input type="checkbox"/> No |                                                                                 |                                                                                                      |
| <b>[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/SWORN AFFIDAVIT (FOR EMEs&amp; QSEs) MUST BE SUBMITTED TOGETHER WITH A COMPLETED 6.1 IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]</b>                          |                                                                                       |                                                                                 |                                                                                                      |
| ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS/ SERVICES/ WORKS OFFERED?                                                                                                                              | <input type="checkbox"/> Yes <input type="checkbox"/> No<br>[IF YES ENCLOSE PROOF]    | ARE YOU A FOREIGN BASED SUPPLIER FOR <b>THE GOODS /SERVICES /WORKS OFFERED?</b> | <input type="checkbox"/> Yes <input type="checkbox"/> No<br>[IF YES, ANSWER THE QUESTIONNAIRE BELOW] |
| <b>QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS</b>                                                                                                                                                                          |                                                                                       |                                                                                 |                                                                                                      |
| IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?                                                                                                                                                            |                                                                                       | <input type="checkbox"/> YES <input type="checkbox"/> NO                        |                                                                                                      |
| DOES THE ENTITY HAVE A BRANCH IN THE RSA?                                                                                                                                                                                  |                                                                                       | <input type="checkbox"/> YES <input type="checkbox"/> NO                        |                                                                                                      |
| DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?                                                                                                                                                                 |                                                                                       | <input type="checkbox"/> YES <input type="checkbox"/> NO                        |                                                                                                      |
| DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?                                                                                                                                                                      |                                                                                       | <input type="checkbox"/> YES <input type="checkbox"/> NO                        |                                                                                                      |
| IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?                                                                                                                                                                  |                                                                                       | <input type="checkbox"/> YES <input type="checkbox"/> NO                        |                                                                                                      |
| <b>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.</b> |                                                                                       |                                                                                 |                                                                                                      |

**PART B**  
**TERMS AND CONDITIONS FOR BIDDING**

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>1. BID SUBMISSION:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <p>1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.</p> <p>1.2. <b>ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED – (NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.</b></p> <p>1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.</p> <p>1.4. <b>THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (WCBD7).</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>2. TAX COMPLIANCE REQUIREMENTS</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <p>2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.</p> <p>2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.</p> <p>2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) OR PIN MAY ALSO BE MADE VIA E-FILING THROUGH THE WEBSITE <a href="http://WWW.SARS.GOV.ZA">WWW.SARS.GOV.ZA</a>.</p> <p>2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE WITH TOGETHER WITH THE BID.</p> <p>2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE AND CSD NUMBER AS MENTIONED IN 2.3 ABOVE.</p> <p>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.</p> <p>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."</p> |
| <b>NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |

SIGNATURE OF BIDDER: .....

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

DATE: .....

## TERMS OF REFERENCE (ToR) (SERVICES)

|              |                              |
|--------------|------------------------------|
| <b>To:</b>   | The Bidder                   |
| <b>From:</b> | Supply Chain Management Unit |

### 1. BID PARTICULARS

|                          |                                                       |                                      |         |
|--------------------------|-------------------------------------------------------|--------------------------------------|---------|
| Project Description      | Panel of Researchers on Economic Development Planning |                                      |         |
| Bid Enquiries            | Ganeefah Abrahams                                     |                                      |         |
|                          | 021 483 9023                                          | Ganeefah.Abrahams@westerncape.gov.za |         |
| Specifications Enquiries | Gershon Oliver                                        |                                      |         |
|                          | 021 483 9497                                          | Gershon.Oliver@ westerncape.gov.za   |         |
| Bid Reference            | EDT 003-25                                            |                                      |         |
| Bid Closing Date         | 18 November 2025                                      | Bid Closing Time                     | 11:00am |

### 2. PURPOSE

- 2.1 The Department of Economic Development and Tourism plays a critical role in the successful implementation of the Growth For Jobs (G4J) Strategy. With respect to a number of overarching key priority areas and programmes, the Department is directly responsible for implementation and successful delivery, and in other cases, the organisation is required to play a guiding or supportive role to other Departments.
- 2.2 One of the key principles of G4J is data-led decision making. Sound decision-making requires a data management and reporting capability that pulls together and utilises the data that the province already has. Establishing strong and agile economic and spatial data, analytical capabilities and intelligence is imperative.

2.3 The primary need for the Panel of Researchers is to provide the DEDAT with scientific evidence, analysis and recommendations regarding the challenges to economic growth and job creation, responses to these challenges and the impact of these responses. The panel will only be engaged where internal capacity is inadequate and where there is a lack of skills for the services that may be required. Researchers will bring independent insight, specialist and external perspectives to the Department's research portfolio and work. These inputs will be provided in the form of reports, models, presentations and notes for discussion at workshops and meetings.

2.4 To this end, the Department seeks to establish a panel comprising of data service providers, and professional and/or specialized researchers in the fields of the following:

1) Financial, 2) Spatial, 3) Statistical, 4) Techno-economic, 5) Macro and micro economic impact assessments, 6) Econometric and other economic modelling; 7) Entrepreneurship, and enterprise development; 8) Micro, Small, Medium Enterprise (MSME) strategies, 9) Township economic development, and the informal economy, 10) The green economy (including the economics of energy, water and waste), 11) Environmental and qualitative economic analysis, 12) Sectoral, industrial and labour market analyses, 13) Data subscriptions such as provision of access to amongst others, economic and/or socio-economic databases, economic IQ and newspaper articles; 14) Statistical analysis software, and survey tools; and 15) Programme evaluation research as prescribed in the National Evaluation Policy Framework. Directorates in DEDAT may procure specialist research and economic development planning services from this panel through an approved and efficient process as and when required for a period of three years, provided that budgets are available and approved.

### **3. BACKGROUND**

3.1 One of the elements of the leadership approach that DEDAT has adopted for G4J Strategy, is to improve regional economic governance and embrace innovation. Vertical and horizontal leadership will be provided within the economy to enable all stakeholders to make the Western Cape a growing, resilient and inclusive economic leader.

- 3.2 The range, depth, complexity and frequency of the professional and technical economic analyses and applications that are required to give effect to this leadership commitment, exceed the internal capacity of the Department. These requirements range from surveys to econometric modelling, sectoral and labour market analyses and development planning, as well as economic impact assessment. It also includes the preparation of appropriate economic indicators in support of rapidly changing economic planning requirements, such as those emerging from the need to promote the development of township economies.

#### **4. NATURE AND SCOPE OF SERVICES TO BE RENDERED**

- 4.1 Professional and/or specialized researchers on all aspects of economic development planning, as described in section 1.3 above, are invited to apply for registration on a panel based on their expertise, experience and compliance with SCM requirements as determined in the Public Finance Management Act.

- 4.2 Service providers will be expected to provide research support, which may include the following services:

- a) Access to the following:
  - Relevant data subscriptions,
  - Statistical software,
  - Digital survey platforms, and
  - Newspaper articles.
- b) Planning, conducting and reporting on surveys and other research methods as required; to obtain market information, socio-economic, economic and doing business information and essential economic data sets.
- c) Research on red tape reduction, regulatory reform, regulatory impact assessments (RIAs) etc.
- d) Sectoral, industry and labour market analyses and assessments.
- e) Econometric and other economic modelling, as well as related systems and processes (macro-economic forecasting is specifically included on a range of indicators that are not available to DEDAT).
- f) Macro and micro economic impact assessments; including Cost Benefit Analysis (CBA) and programme evaluation research as prescribed in the National Evaluation Policy Framework.



- g) Compilation of appropriate economic development and competitiveness indicators and indexes, including indicators of inclusive economic development.
- h) Development and application of appropriate analytical capacity to rank project options to facilitate resource allocation for the greatest local economic and job creation impact.
- i) Research on provincial, municipal and local economic growth and development, as well as for emerging economic issues, such as the township economy, informal sector, R&D and innovation, technology disruption, AI and machine learning and the application of principles from behavioural economics.
- j) Research and planning for spatial constraints and implications for economic development in a local context.
- k) Evidence-based and locally appropriate recommendations for the promotion of economic resilience and sustainability, with specific reference to the green economy, including the economics of energy, water and waste.
- l) Identification of options to mitigate or circumvent barriers to economic growth and job creation.
- m) Identification of international best practice and benchmarking regarding economic development promotion.
- n) Strategy, policy development, research and planning as it relates to entrepreneurship and enterprise development; Micro, Small, Medium Enterprise (MSME) strategies, township economic development and/or the informal economy.

## **5. MINIMUM REQUIREMENTS FOR A VALID BID**

5.1 Service providers that fail to adhere to any of the following will be rendered non-compliant:

- a) Bidders must submit proposal before the bid closing date and time.
- b) Bidders must be registered on Central Supplier Database (CSD).
- c) Each party participating in a Joint Venture or Consortiums must be tax compliant and must provide a WCBD 4.

## **6. SERVICE PROVIDERS PROPOSAL**

6.1 Bidders are required to submit the documents mentioned below. **Failure to**

**comply will render the bidder's application non-compliant:**

- a) The names, CVs, and fields of expertise for each of their researchers (CVs must reflect academic qualifications and years of professional experience). The lead researcher must have a master's degree or higher in economics, business or economic development as specified in paragraph 3 above; and at least five years of research experience in at least one of the nominated categories or fields in paragraph 3.3 b – n above. Information contained in the CVs should be summarised in the Company Expertise table that is provided. Evidence of experience must be provided in CVs in the form of titles of previous work with an abstract of what the work entailed.
- b) Information on three client project managers who may be contacted for references on the quality of their recent work during past five (5)-years. The written work reference letters should include company letterheads, dates and be signed by company in question.
- c) Data Service Provider company details, area of expertise covering all product offerings, service subscriptions, provision of access to statistical software, newspaper articles etc. The data service provider will be required to provide THREE written and contactable work references (with company letterheads, dates and signed) where access to their respective product offering(s) was provided in the last 5-years. The data vendor can annex their brochures or SLAs to the proposal (where available). Importantly, the data service providers should ensure that automatic renewals do not apply to the Department.
- d) Furthermore, researchers must possess at least 5-years of professional experience in their areas of specialisation as indicated in section 3.3 above.

## **7. EVALUATION METHODOLOGY**

- 7.1 **Phase 1:** Compliance with compulsory requirements: during this phase, bids will be verified against the minimum eligibility requirements as set out in sections 4 and 7 of this Terms of Reference. If bids do not meet the minimum eligibility requirements, they will be deemed non-responsive and will not be evaluated further.

**Phase 2:** Responsive bids will, thereafter, be evaluated for compliance / non-compliance with the minimum requirements as per the table outlined below:

| #  | CRITERIA: MINIMUM REQUIREMENTS                                                                                                                                                                                                                                                                              | REFERENCE        |
|----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|
| 1. | <b>Project-based:</b> The lead researcher/project leader/ project manager is required to possess a minimum of 5-years of a combination of local and/or international project-based experience in at least one of the identified areas of bidding in paragraph 3.3.                                          | Paragraph 5.1(a) |
| 2. | <b>Project-based:</b> Minimum qualifications of the lead researcher/project leader/ project manager should be a Masters' degree, business or economic development to the identified area(s) for bidding.                                                                                                    | Paragraph 5.1(a) |
| 3. | <b>Project-based:</b> Proven track record of relevant / related projects in the past. The service provider will be required to provide <b>THREE written</b> and contactable work references (with company letterheads, dates and in a signed format) where similar work was undertaken in the last 5-years. | Paragraph 5.1(b) |
| 4. | <b>Data subscriptions:</b> The data service provider will be required to provide <b>THREE written</b> and contactable work references (with company letterheads, dates and signed) where access to their respective product offering(s) was provided in the last 5-years.                                   | Paragraph 5.1(c) |

- 7.2 The lead researcher/project leader/ project manager would be the leader of the project.
- 7.3 Only project-based bidders that "comply" to the first three (3) minimum criteria will be listed on the database and be eligible to submit quotations for job briefs as the need arises.
- 7.4 Only data subscription bidders that "comply" to the fourth minimum criterion will be listed on the database and be eligible to submit quotations for job briefs as the need arises.
- 7.5 Written work reference letters indicating previous work done by no less than **THREE** contactable client references (with company letterheads, dates and signed by

company in question) will be subject to a reference checking.

7.6 After the establishment of the Panel, Job Briefs will be compiled as and when required; and will be circulated to panel members with requests for quotations or proposals. Each Job Brief may contain its own unique evaluation criteria.

7.7 There is no guarantee that Job Briefs will be issued for all categories of services listed on the Panel and being registered on the Panel does not guarantee that a Service Provider will be awarded work.

#### 7.8 **UTILISATION FROM THE PANEL OF RESEARCHERS (JOB BRIEF)**

- The Job Brief may be advertised with functional evaluation criteria or specific compliance requirements before the final phase where the 80/20 preference points system would apply.
- **80/20 Preference Points System** - Only qualifying bids will be evaluated in terms of the 80/20 preference points system, where the 80 points will be used for price and the 20 points are awarded to the bidder for attaining BBBEE status level contributor, in accordance with their BBBEE Certificate or affidavit.

### 8. **COMPULSORY RETURNABLE DOCUMENTS**

The following documents are compulsory and must be submitted according to the table below. Failure to submit documents listed under Table 1 below will result in disqualification.

**Table 1: List of Compulsory Bid Documents and requirements**

| Document to be submitted                       | Disqualification | Description / Instruction                                                                      |
|------------------------------------------------|------------------|------------------------------------------------------------------------------------------------|
| <b>Proposal and / or portfolio of evidence</b> | Yes              | Bidders' proposal and supporting documentation                                                 |
| <b>WCBD 1</b>                                  | Yes              | <b>Invitation to bid</b><br>1) Authorised representative to sign bid.<br>2) Complete and sign. |

|                                      |     |                                                                                                                                                                                                                                                                                                                                                                                           |
|--------------------------------------|-----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>WCBD 4</b>                        | Yes | <b>Declaration of Interest, Declaration of Bidder's Past Supply Chain Management Practices and Certificate of Independent Bid Determination</b><br>1) Complete and sign.                                                                                                                                                                                                                  |
| <b>WCBD 6.1</b>                      | No  | <b>Preference Points Claim Form</b><br>1) Non-submission will lead to zero (0) score for B-BBEE points.<br>2) Only the B-BBEE status stated on the completed WCBD 6.1 will apply to the evaluation of this bid and not the B-BBEE status on the WCSEB or CSD.<br>3) Complete and sign.<br>4) Complete section 9 within the WCBD 6.1, if bidder will sub-contract any part of the service. |
| <b>BBBEE Certificate / Affidavit</b> | No  | To be submitted with the WCBD 6.1                                                                                                                                                                                                                                                                                                                                                         |

## 9. DURATION OF CONTRACT

- 9.1 The service providers will be appointed to the **Panel of Researchers** for **DEDAT** for a period of three (3) years ending on 30 November 2028, subject to the performance of the service provider(s). The performance of appointed service provider(s) will be reviewed on an annual basis and/or on completion of a specific project.
- 9.2 Requests for service providers to submit applications for inclusion on the Panel will remain open for the remainder of the 3-year period and this process will be managed through bid re-advertising windows.

## 10. TRAINING AND TRANSFER OF SKILLS

- 10.1 The terms of reference for the request for quotations or proposals from panel members for specific services, may include appropriate training and transfer of skills pertaining to that unique service, whether it be a survey or econometric modelling or any other expert service. In this event, the project manager for each specific service will be expected to nominate a suitable official for practical training and skills development on the job.

## 11. JOINT VENTURE / CONSORTIUM / TRUST

- 11.1 A joint venture, consortium or trust will qualify for points on evaluation of their B-BBEE status level as a legal entity, provided that the entity submits the requisite B-BBEE status level certificate.
- 11.2 Bidders must submit substantive proof of the existence of joint ventures and/or consortium arrangements. The department will accept signed agreements as satisfactory proof for the existence of a joint venture and/or consortium arrangement.
- 11.3 Joint venture and/or consortium agreements must clearly set out the roles and responsibilities of the lead partner. The agreement must also clearly identify the lead partner that is accordingly provided with a power of attorney to bind the other co- parties in all matters pertaining to the joint venture and/or consortium arrangement.

## 12. REGISTRATION ON SUPPLIER DATABASES

- 12.1 Prospective bidders must be registered on the Central Supplier database (CSD) at the time of bid closure.
- 12.2 All prospective bidders who are not registered on the Central Supplier Database are requested to self-register on [www.csd.gov.za](http://www.csd.gov.za). For further assistance with the registration process, please contact National Treasury on (012) 315 5509 or e-mail [csd@treasury.gov.za](mailto:csd@treasury.gov.za)
- 12.3 **Registration on databases and compliance of tax status will be verified at the time of application for listing on the panel.** Where the successful service providers to be listed on the panel are not tax compliant, the department will notify the bidder in writing of their non-compliant status and the bidder will be requested to submit written proof from SARS of their tax compliance status or proof that they have arranged to meet their outstanding tax obligations within 7-working days.

### **13. CONTRACTUAL ASPECTS**

- 13.1 The contents of this document shall be deemed to constitute the Special Conditions of Contract applicable to this bid and shall be read together with the General Conditions of Contract issued in accordance with Chapter 16A of the Treasury Regulations.
- 13.2 Where, however, the Special Conditions of Contract conflict with the General Conditions of Contract, the Special Conditions of Contract shall prevail.
- 13.3 The bid document, together with the specifications contained in this document, shall constitute part of the Contract.
- 13.4 Bidders shall not perform any work or render any services in terms of the Contract unless in receipt of a written instruction to this effect by the Department.
- 13.5 The successful bidder may not assign his/ her obligations.
- 13.6 The successful bidder must advise the Head of Department of Economic Development and Tourism immediately when unforeseeable circumstances will adversely affect the execution of the contract. Full particulars of such circumstances as well as the period of delay must be furnished.

### **14. DISCLAIMER**

- 14.1 Bidders must make and rely on their own investigations and satisfy themselves as to the correctness of all aspects of the bid. The Department will not be liable for any incorrect or potentially misleading information in relation to any part of this document and any accompanying bid documents.
- 14.2 The department reserves the right not to appoint any contracted partner who does not comply with the conditions of this bid or if information is obtained by the department about a bidder that could put the department at risk.
- 14.3 The department reserves the right to cancel this bid should the budget not be available at the time of award to cover the full quote of this tender or if the need does not exist anymore or the specification has changed.

## **15. ABSENCE OF OBLIGATION**

- 15.1 No legal or other obligation shall arise between bidders and the Department unless and until the formal appointment documentation has been signed. The Department is not obliged to proceed with any proposals of any bidder. The Department also reserves the right to request changes to any proposed consortium.

## **16. INDEMNITY**

- 16.1 The successful bidder will indemnify, protect, defend and hold harmless the Department from and against any and all claims, demands, actions and proceedings whatsoever including all fees, costs and expenses incurred in respect thereof arising out of:

- a) Any claim of any taxes payable by the bidder.
- b) Any claim for Workmen's Compensation Insurance or for any loss for which the bidder is liable.
- c) Any claim by any employee of the Department or of the bidder for any loss resulting from any bodily injury and or damages to property by any act or omission of the bidder or any of its employees, servants or agents.

## **16. FRONTING**

- 16.1 The department supports the spirit of broad-based black economic empowerment and recognises that real empowerment can only be achieved through individuals and businesses conducting themselves in accordance with the Constitution and garnering opportunities in an honest, fair, equitable, transparent, and legally compliant manner. Against this background the department strongly condemns any form of fronting.
- 16.2 The department, in ensuring that bidders conduct themselves in an honest manner will, as part of the bid evaluation processes, conduct, or initiate the necessary enquiries / investigations in determining the accuracy of the representations made in bid documents / proposals. Should any of the fronting indicators as contained in the Guidelines on Complex Structures and Transactions and Fronting, issued by the Department of Trade Industry and Competition ("dtic"), be determined during such enquiry / investigation, the onus will be on the bidder to prove that the



allegation of fronting does not exist. Failure to do so within a period of 14-days from date of notification may invalidate the bid / contract and may also result in the restriction of the bidder to conduct business with the public sector for a period not exceeding 10- years, in addition to any other remedies the department may have at its disposal and accordingly wish to institute against such bidder concerned.

## **17. CONFLICT OF INTEREST, CORRUPTION AND FRAUD**

17.1 The department reserves the right to disqualify any potential bidding agency who either itself, or through any of its members (save for such members who hold a minority interest in the bidding agency through shares listed on any recognised stock exchange), indirect members (being any person or entity who indirectly holds at least a 15% interest in the bidder other than in the context of shares listed on a recognised stock exchange), directors or members of senior management, whether in respect of the department or any other department organ or entity and whether from the Republic of South Africa or otherwise:

- a) Engages in any collusive tendering, anti-competitive conduct, or any other similar conduct, including but not limited to any collusion with any other bidder in respect of the subject matter of this bid.
- b) Seeks any assistance, other than assistance officially provided by a department, from any employee, advisor or other representative of a department in order to obtain any unlawful advantage in relation to the procurement or services provided or to be provided to the department, officers, directors, employees, advisors or other representatives.
- c) Makes or offers any gift, gratuity, anything of any value or other inducement, to any departmental officers, directors, employees, advisors or other representatives in order to obtain any unlawful advantage in relation to procurement or services provided or to be provided to a department.
- d) Accepts anything of value or an inducement that would or may provide financial gain, advantage or benefit in relation to procurement or services provided or to be provided to a department.
- e) Pays or agrees to pay to any person any fee, commission, percentage, brokerage fee, gift, or any other consideration, that is contingent upon or results from, the awarding of any tender, contract, right or entitlement which is in any way related to procurement or the rendering of any services to the department.
- f) Has in the past engaged in any matter referred to above.

- g) Has been found guilty in a court of law on charges of fraud and/or forgery, regardless of whether or not a prison term was imposed and despite such a bidding agency, member or director's name(s) not specifically appearing on the List of Tender Defaulters kept at National Treasury.

## **18. MISREPRESENTATION DURING THE LIFECYCLE OF THE CONTRACT**

- 18.1 The bidding agency should note that the terms of its tender will be incorporated in the proposed contract by reference and that the department relies upon the bidder's tender as a material representation in making an award to a successful bidding agency and in concluding an agreement with said bidding agency.
- 18.2 It follows therefore that misrepresentations in a tender may give rise to service termination and a claim by the department against the bidder notwithstanding the conclusion of the SLA between the Department and the bidding agency for the provision of the service(s) in question. In the event of a conflict between the bidder's proposal and the SLA concluded between the parties, the contents of the SLA will prevail.

## **19. CONFIDENTIALITY**

- 19.1 Except as may be required by the operation of law, by a court or by any regulatory authority having appropriate jurisdiction, no information contained in- or relating to this bid or a bidding agency's bid will be disclosed by any bidder or other person not officially involved with the department's examination and evaluation of a bid.
- 19.2 No part of the bid may be distributed, reproduced, stored or transmitted, in any form or by any means, electronically, or by way of photocopying, recording or otherwise, in whole or in part except for the purpose of preparing a tender. This bid and any other documents supplied by the Department remain proprietary to the department and must be promptly returned to the department upon request, together with all copies, electronic versions, excerpts or summaries thereof or work as a consequence derived there from.
- 19.3 Throughout this bid process and thereafter, bidding agencies must secure the department's written approval prior to the release of any information that pertains to **(i)** the potential work or activities to which this bid relates; or **(ii)** the process which follows this bid. Failure to adhere to this requirement may result in

disqualification from the bid process and civil action.

**20. IMPORTANT NOTES TO BIDDER**

20.1 The Department of Economic Development and Tourism conducts business in an ethical and fair manner. Any procurement irregularities, bribery or other misconduct must be reported to:

Postal address: PO Box 659, Cape Town, 8000 Email:

tip.offers@westerncape.gov.za

Tel: 021 483 0901/0931

Fax: 021 483 0928

Street address: Atterbury House, 9 Riebeek Street, 9th Floor, Cape Town

Provincial Forensic Services 021 483 0931

National Anti-corruption Hotline 0800 701 701

**END.**

**PROVINCIAL GOVERNMENT WESTERN CAPE  
DECLARATION OF INTERESTS, BIDDERS PAST SCM PRACTICES AND INDEPENDENT BID DETERMINATION**

1. To give effect to the requirements of the Western Cape Provincial Treasury Instructions, 2019: Supply Chain Management (Goods and Services), Practice Note 4 of 2006 Declaration of Bidders Past SCM Practices-(SDB8), Instruction note Enhancing Compliance Monitoring and Improving Transparency and Accountability in Supply Chain Management, Practice note 7 of 2009/10 - SBD 4 Declaration of Interest, Practice Note 2010 Prohibition of Restrictive practices SBD9, Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998 as amended together with its associated regulations, the Prevention and Combating of Corrupt Activities Act No 12 of 2004 and regulations pertaining to the tender defaulters register, Paragraph 16A9 of the National Treasury Regulations and/or any other applicable legislation.

2. All prospective bidders intending to do business with the Institution must be registered on the Central Supplier Database (CSD) and the Western Cape Supplier Evidence Bank (WCSEB) if they wish to do business with the Western Cape Government (WCG) via the electronic Procurement Solution (ePS).

**3. Definitions**

**“bid”** means a bidder’s response to an institution’s invitation to participate in a procurement process which may include a bid, price quotation or proposal;

**“Bid rigging (or collusive bidding)”** occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and / or services for purchasers who wish to acquire goods and/or services through a bidding process. Bid rigging is, therefore, an agreement between competitors;

**“business interest”** means -

- (a) a right or entitlement to share in profits, revenue or assets of an entity;
- (b) a real or personal right in property;
- (c) a right to remuneration or any other private gain or benefit, or
- (d) includes any interest contemplated in paragraphs (a), (b) or (c) acquired through an intermediary and any potential interest in terms of any of those paragraphs;

4. **“Consortium or Joint Venture”** 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;

5. **“Corruption”**- General offences of corruption are defined in the Combating of Corrupt Activities

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Act, 2004 (Act No 12 of 2004) as:

Any person who directly or indirectly-

(a) accepts or agrees or offers to accept an! gratification from any other person, whether for the benefit of himself or herself or for the benefit of another person; or

(b) gives or agrees or offers to give to any other person any gratification, whether for the benefit of that other person or for the benefit of another person., in order to act personally or by influencing another person so to act, in a manner—

(i) that amounts to the-

(aa) illegal, dishonest, unauthorised, incomplete, or biased; or

(bb) misuse or selling of information or material acquired in the course of the exercise, carrying out or performance of any powers, duties or functions arising out of a constitutional, statutory, contractual or any other legal obligation;

(ii) that amounts to-

(aa) the abuse of a position of authority;

(bb) a breach of trust; or

(cc) the violation of a legal duty or a set of rules;

(iii) designed to achieve an unjustified result; or

(iv) that amounts to any other unauthorised or improper inducement to do or 45 not to do anything, of the, is guilty of the offence of corruption

“CSD” means the Central Supplier Database maintained by National Treasury;

“employee”, in relation to –

(a) a department, means a person contemplated in section 8 of the Public Service Act, 1994 but excludes a person appointed in terms of section 12A of that Act; and

(b) a public entity, means a person employed by the public entity;

“entity” means any -

(a) association of persons, whether or not incorporated or registered in terms of any law, including a company, corporation, trust, partnership, close corporation, joint venture or consortium; or

(b) sole proprietorship;

“entity conducting business with the Institution” means an entity that contracts or applies or tenders for the sale, lease or supply of goods or services to the Province;

“Family member” means a person's –

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(a) spouse; or

(b) child, parent, brother, sister, whether such a relationship results from birth, marriage or adoption or some other legal arrangement (as the case may be);

**“intermediary”** means a person through whom an interest is acquired, and includes a representative or agent or any other person who has been granted authority to act on behalf of another person;

**“Institution”** means – a provincial department or provincial public entity listed in Schedule 3C of the Act;

**“Provincial Government Western Cape (PGWC)”** means

(a) the Institution of the Western Cape, and

(b) a provincial public entity;

**“RWOEE”** means -

Remunerative Work Outside of the Employee's Employment

**“spouse”** means a person's -

(a) partner in marriage or civil union according to legislation;

(b) partner in a customary union according to indigenous law; or

(c) partner with whom he or she cohabits and who is publicly acknowledged by the person as his or her life partner or permanent companion.

4. Regulation 13(c) of the Public Service Regulations (PSR) 2016, effective 1 February 2017, prohibits any employee from conducting business with an organ of state, or holding a directorship in a public or private company doing business with an organ of state unless the employee is a director (in an official capacity) of a company listed in schedules 2 and 3 of the Public Finance Management Act.

a) Therefore, by 31 January 2017 all employees who are conducting business with an organ of state should either have:

(i) resigned as an employee of the government institution or;

(ii) cease conducting business with an organ of state or;

(iii) resign as a director/shareholder/owner/member of an entity that conducts business with an organ of state.

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5. Any legal person, or their family members, may make an offer or offers in terms of this invitation to bid. In view of potential conflict of interest, in the event that the resulting bid, or part thereof, be awarded to family members of persons employed by an organ of state, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where the bidder is employed by the Institution
6. The bid of any bidder may be disregarded if that bidder or any of its directors abused the institution's supply chain management system; committed fraud or any other improper conduct in relation to such system; or failed to perform on any previous contract.
7. Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging). Collusive bidding is a per se prohibition meaning that it cannot be justified under any grounds.
8. Treasury Regulation 16A9 prescribes that accounting officers and accounting authorities must take all reasonable steps to prevent abuse of the supply chain management system and authorises accounting officers and accounting authorities to:
- disregard the bid of any bidder if that bidder, or any of its directors have abused the institution's supply chain management system and or committed fraud or any other improper conduct in relation to such system.
  - cancel a contract awarded to a supplier of goods and services if the supplier committed any corrupt or fraudulent act during the bidding process or the execution of that contract.
9. Communication between partners in a joint venture or consortium will not be construed as collusive bidding.
10. 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.

| SECTION A: DETAILS OF THE ENTITY                                                                                                                                                                                            |                                                  |      |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|------|
|                                                                                                                                                                                                                             | CSD Registration Number                          | MAAA |
|                                                                                                                                                                                                                             | Name of the Entity                               |      |
|                                                                                                                                                                                                                             | Entity registration Number<br>(where applicable) |      |
|                                                                                                                                                                                                                             | Entity Type                                      |      |
|                                                                                                                                                                                                                             | Tax Reference Number                             |      |
| Full details of directors, shareholder, member, partner, trustee, sole proprietor or any persons with a right or entitlement to share in profits, revenue or assets of the entity should be disclosed in the Table A below. |                                                  |      |

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TABLE A

| FULL NAME | DESIGNATION<br>(Where a director is a shareholder, both should be confirmed) | IDENTITY NUMBER | PERSONAL TAX REFERENCE NO. | PERCENTAGE INTEREST IN THE ENTITY |
|-----------|------------------------------------------------------------------------------|-----------------|----------------------------|-----------------------------------|
|           |                                                                              |                 |                            |                                   |
|           |                                                                              |                 |                            |                                   |
|           |                                                                              |                 |                            |                                   |
|           |                                                                              |                 |                            |                                   |
|           |                                                                              |                 |                            |                                   |
|           |                                                                              |                 |                            |                                   |
|           |                                                                              |                 |                            |                                   |
|           |                                                                              |                 |                            |                                   |
|           |                                                                              |                 |                            |                                   |

**SECTION B: DECLARATION OF THE BIDDER'S INTEREST**

The supply chain management system of an institution must, irrespective of the procurement process followed, prohibit any award to an employee of the state, who either individually or as a director of a public or private company or a member of a close corporation, seek to conduct business with the WCG, unless such employee is in an official capacity a director of a company listed in Schedule 2 or 3 of the PFMA as prescribed by the Public Service Regulation 13 (c).

Furthermore, an employee employed by an organ of state conducting remunerative work outside of the employee's employment should first obtain the necessary approval by the delegated authority (RWOEE), failure to submit proof of such authority, where applicable, may result in disciplinary action.

|            |                                                                                                                                                                                        |    |     |
|------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|-----|
| <b>B1.</b> | Are any persons listed in Table A identified on the CSD as employees of an organ of state? <b>(If yes, refer to Public Service Circular EIM 1/2016 to exercise the listed actions)</b> | NO | YES |
| <b>B2.</b> | Are any employees of the entity also employees of an organ of state? <b>(If yes complete Table B and attach their approved "RWOEE")</b>                                                | NO | YES |
| <b>B3.</b> | Are any family members of the persons listed in Table A employees of an organ of state? <b>(If yes complete Table B)</b>                                                               | NO | YES |

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**TABLE B**

Details of persons (family members) connected to or employees of an organ of state should be disclosed in Table B below.

| FULL NAME OF EMPLOYEE | IDENTITY NUMBER | DEPARTMENT/<br>ENTITY OF<br>EMPLOYMENT | DESIGNATION/<br>RELATIONSHIP TO<br>BIDDER** | INSTITUTION<br>EMPLOYEE NO./<br>PERSAL NO.<br>(Indicate if not<br>known) |
|-----------------------|-----------------|----------------------------------------|---------------------------------------------|--------------------------------------------------------------------------|
|                       |                 |                                        |                                             |                                                                          |
|                       |                 |                                        |                                             |                                                                          |
|                       |                 |                                        |                                             |                                                                          |
|                       |                 |                                        |                                             |                                                                          |
|                       |                 |                                        |                                             |                                                                          |
|                       |                 |                                        |                                             |                                                                          |
|                       |                 |                                        |                                             |                                                                          |
|                       |                 |                                        |                                             |                                                                          |
|                       |                 |                                        |                                             |                                                                          |

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**SECTION C: PERFORMANCE MANAGEMENT AND BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES** To enable the prospective bidder to provide evidence of past and current performance.

|            |                                                                                                                |    |     |
|------------|----------------------------------------------------------------------------------------------------------------|----|-----|
| <b>C1.</b> | Did the entity conduct business with an organ of state in the last twelve months?<br>(If yes complete Table C) | NO | YES |
|------------|----------------------------------------------------------------------------------------------------------------|----|-----|

**C2. TABLE C**

| NAME OF CONTRACTOR                                                                                                                                                                                                                                                                    | PROVINCIAL DEPARTMENT OR PROVINCIAL ENTITY | TYPE OF SERVICES OR COMMODITY | CONTRACT/ ORDER NUMBER | PERIOD OF CONTRACT | VALUE OF CONTRACT |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------|-------------------------------|------------------------|--------------------|-------------------|
|                                                                                                                                                                                                                                                                                       |                                            |                               |                        |                    |                   |
|                                                                                                                                                                                                                                                                                       |                                            |                               |                        |                    |                   |
|                                                                                                                                                                                                                                                                                       |                                            |                               |                        |                    |                   |
|                                                                                                                                                                                                                                                                                       |                                            |                               |                        |                    |                   |
|                                                                                                                                                                                                                                                                                       |                                            |                               |                        |                    |                   |
| <b>C3.</b> Is the entity or its principals listed on the National Database as companies or persons prohibited from doing business with the public sector?                                                                                                                             |                                            |                               |                        |                    | NO YES            |
| <b>C4.</b> Is the entity or its principals listed on the National Treasury Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No. 12 of 2004)?                                                                          |                                            |                               |                        |                    | NO YES            |
| (To access this Register enter the National Treasury's website, <a href="http://www.treasury.gov.za">www.treasury.gov.za</a> , click on the icon "Register for Tender Defaulters" or submit your written request for a hard copy of the Register to facsimile number (012) 326 5445.) |                                            |                               |                        |                    |                   |
| <b>C5.</b> If yes to C3 or C4, were you informed in writing about the listing on the database of restricted suppliers or Register for Tender Defaulters by National Treasury?                                                                                                         |                                            |                               |                        | NO                 | YES N/A           |
| <b>C6.</b> Was the entity or persons listed in Table A convicted for fraud or corruption during the past five years in a court of law (including a court outside the Republic of South Africa)?                                                                                       |                                            |                               |                        |                    | NO YES            |
| <b>C7.</b> Was any contract between the bidder and any organ of state terminated during the past five years on account of failure to perform on or comply with the contract?                                                                                                          |                                            |                               |                        |                    | NO YES            |

**Complete the below table to the maximum of the last 5 contracts.**

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**SECTION D: DULY AUTHORISED REPRESENTATIVE TO DEPOSE TO AFFIDAVIT**

*This form must be signed by a duly authorised representative of the entity in the presence of a commissioner of oaths.*

I, ..... hereby swear/affirm; i. that the information disclosed above is true and accurate; ii. that I understand the content of the document;

iii. the entity undertakes to independently arrive at any offer at any time to the Institution without any consultation, communication, agreement or arrangement with any competitor. In addition, that there will be no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to the Institution.

iv. that the entity or its representative are aware of and undertakes not to disclose the terms of any bid, formal or informal, directly or indirectly, to any competitor, prior to the awarding of the contract.

.....

**DULY AUTHORISED REPRESENTATIVE'S SIGNATURE**

I certify that before administering the oath/affirmation I asked the deponent the following questions and wrote down his/her answers in his/her presence:

1.1 Do you know and understand the contents of the declaration? ANSWER: .....

1.2 Do you have any objection to taking the prescribed oath? ANSWER: .....

1.3 Do you consider the prescribed oath to be binding on your conscience? ANSWER:.....

1.4 Do you want to make an affirmation? ANSWER: .....

2. I certify that the deponent has acknowledged that he/she knows and understands the contents of this declaration, which was sworn to/affirmed and the deponent's signature/thumbprint/mark was placed thereon in my presence.

.....

SIGNATURE FULL NAMES Commissioner of Oaths

Designation (rank) ..... ex officio: Republic of South Africa

Date:..... Place .....

Business Address: .....

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## PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022 AND IN TERMS OF THE WESTERN CAPE GOVERNMENTS INTERIM STRATEGY AS IT RELATES TO PREFERENCE POINTS

This preference form must form part of all bids invited. It contains general information and serves as a claim form for preference points for Broad-Based Black Economic Empowerment (B-BBEE) Status Level of Contribution

**NB: BEFORE COMPLETING THIS FORM, BIDDERS (TENDERERS) MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER, PREFERENTIAL PROCUREMENT REGULATIONS, 2022 AND THE BROAD BASED BLACK ECONOMIC EMPOWERMENT ACT AND THE CODES OF GOOD PRACTICE**

### 1. DEFINITIONS

- 1.1 **"acceptable tender"** means any tender which, in all respects, complies with the specifications and conditions of tender as set out in the tender document.
- 1.2 **"affidavit"** is a type of verified statement or showing, or in other words, it contains a verification, meaning it is under oath or penalty of perjury, and this serves as evidence to its veracity and is required for court proceedings.
- 1.3 **"all applicable taxes"** includes value-added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies;
- 1.4 **"B-BBEE"** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- 1.5 **"B-BBEE status level of contributor"** means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- 1.6 **"bid"** means a written offer on the official bid documents or invitation of price quotations and "tender" is the act of bidding /tendering;
- 1.7 **"Code of Good Practice"** means the generic codes or the sector codes as the case may be;
- 1.8 **"consortium or joint venture"** 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; **"contract"** means the agreement that results from the acceptance of a bid by an organ of state;
- 1.9 **"EME"** is an Exempted Micro Enterprise with an annual total revenue of R10 million or less.
- 1.10 **"Firm price"** means the price that is only subject to adjustments in accordance with the actual increase or decrease resulting from the change, imposition, or abolition of customs or excise duty and any other duty, levy, or tax, which, in terms of the law or regulation, is binding on the contractor and demonstrably has an influence on the price of any supplies, or the rendering costs of any service, for the execution of the contract;

Version: January 2023

- 1.11 **"Large Enterprise"** is any enterprise with an annual total revenue above R50 million;
- 1.12 **"non-firm prices"** means all prices other than "firm" prices;
- 1.13 **"person"** includes a juristic person;
- 1.14 **"price"** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- 1.15 **"proof of B-BBEE status level contributor"** means-
- (a) The B-BBEE status level certificate issued by an authorized body or person;
  - (b) A sworn affidavit as prescribed in terms of the B-BBEE Codes of Good Practice; or
  - (c) Any other requirement prescribed in terms of the Broad- Based Black Economic Empowerment Act.
- 1.16 **QSE** is a Qualifying Small Enterprise with an annual total revenue between R10 million and R50 million;
- 1.17 **"rand value"** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- 1.18 **"sub-contract"** means the primary contractor's assigning, leasing, making out work to, or employing, another person to support such primary contractor in the execution of part of a project in terms of the contract.
- 1.19 **"tender"** means a written offer in the form determined by an organ of state in response to an invitation to provide or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- 1.20 **"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;
- 1.21 **"the Act"** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000);
- 1.22 **"the Regulations"** means the Preferential Procurement Regulations, 2022;
- 1.23 **"total revenue"** bears the same meaning assigned to this expression in the Codes of Good Practice on Black Economic Empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act and promulgated in the *Government Gazette* on 11 October 2013;
- 1.24 **"trust"** means the arrangement through which the property of one person is made over or bequeathed to a trustee to administer such property for the benefit of another person; and
- 1.25 **"trustee"** means any person, including the founder of a trust, to whom property is bequeathed in order for such property to be administered for the benefit of another person.

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## 2. GENERAL CONDITIONS

2.1 The following preference point systems are applicable to all bids:

- a) the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- b) the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

2.2 Preference point system for this bid:

- a) The value of this bid is estimated to exceed/not exceed R50 000 000 (all applicable taxes included) and therefore the preference point system shall be applicable; or
- b) **Either the 80/20 or 90/10 preference point system will be applicable to this tender** (delete whichever is not applicable for this tender).

2.3 Preference points for this bid (even in the case of a tender for income-generating contracts) shall be awarded for:

- a) Price; and
- b) B-BBEE Status Level of Contribution.

2.4 The maximum points for this bid are allocated as follows:

|                                                   | POINTS |
|---------------------------------------------------|--------|
| PRICE                                             | 80/90  |
| B-BBEE STATUS LEVEL OF CONTRIBUTOR                | 20/10  |
| Total points for Price and B-BBEE must not exceed | 100    |

2.5 Failure on the part of a bidder to fill in, sign this form and submit in the circumstances prescribed in the Codes of Good Practice either a B-BBEE Verification Certificate issued by a Verification Agency accredited by the South African Accreditation System (SANAS) or an affidavit confirming annual total revenue and level of black ownership together with the bid or an affidavit issued by Companies Intellectual Property Commission, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.

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

## 3. ADJUDICATION USING A POINT SYSTEM

3.1 Subject to Section 2 (1) (f) of the Preferential Procurement Policy Framework Act, 2000, the **bidder obtaining the highest number of total points** will be awarded the contract.

- 3.2 A tenderer must submit proof of its B-BBEE status level of contributor in order to claim points for B-BBEE.
- 3.3 A tenderer failing to submit proof of B-BBEE status level of contributor or is a non-compliant contributor to B-BBEE will not be disqualified but will only score:
- a) points out of 80 for price; and
  - b) 0 points out of 20 for B-BBEE
- 3.4 Points scored must be rounded off to the nearest 2 decimal places.
- 3.5 In the event that two or more bids have scored equal total points, the successful bid must be the one scoring the highest number of preference points for B-BBEE.
- 3.6 As per section 2 (1) (f) of the Preferential Procurement Policy Framework Act, 2000, the contract may be awarded to a bidder other than the one scoring the highest number of total points based on objective criteria in addition to those contemplated in paragraph (d) and (e) of the Act that justifies the award to another tenderer provided that it has been stipulated upfront in the tendering conditions.
- 3.7 Should two or more bids be equal in all respects; the award shall be decided by the drawing of lots.

#### **4. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES**

##### **4.1 POINTS AWARDED FOR PRICE**

##### **4.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEM**

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

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

Where

$P_s$  = Points scored for price of bid under consideration

$P_t$  = Price of tender under consideration

$P_{\min}$  = Price of lowest acceptable tender

## 5. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

### 5.1 POINTS AWARDED FOR PRICE

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

80/20

or

90/10

$$Ps = 80 \left( 1 + \frac{Pt - P_{max}}{P_{max}} \right)$$

$$Ps = 90 \left( 1 + \frac{Pt - P_{max}}{P_{max}} \right)$$

or

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmax = Price of highest acceptable tender

## 6. POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTION

- 6.1 In terms of WCG interim strategy, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

| B-BBEE Status Level of Contributor | Number of points (90/10 system) | Number of points (80/20 system) |
|------------------------------------|---------------------------------|---------------------------------|
| 1                                  | 10                              | 20                              |
| 2                                  | 9                               | 18                              |
| 3                                  | 6                               | 14                              |
| 4                                  | 5                               | 12                              |
| 5                                  | 4                               | 8                               |
| 6                                  | 3                               | 6                               |
| 7                                  | 2                               | 4                               |
| 8                                  | 1                               | 2                               |
| Non-compliant contributor          | 0                               | 0                               |

- 6.2 An **EME** must submit a valid, originally certified affidavit confirming annual turnover and level of black ownership or an affidavit issued by Companies Intellectual Property Commission
- 6.3 A **QSE that is less than 51 per cent (50% or less) black owned** must be verified in terms of the QSE scorecard issued via Government Gazette and submit a valid, original or a legible certified copy of a B-BBEE Verification Certificate issued by SANAS.
- 6.4 A QSE that is at least 51 per cent black owned (51% or higher) must submit a valid, originally certified affidavit confirming turnover and level of black ownership as well as declare its empowering status or an affidavit issued by Companies Intellectual Property Commission.

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- 6.5 A **large enterprise** must submit a valid, original or originally certified copy of a B-BBEE Verification Certificate issued by a verification agency accredited by SANAS.
- 6.6 A trust, consortium or joint venture, will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their B-BBEE status level certificate.
- 6.7 A trust, consortium or joint venture (including unincorporated consortia and joint ventures) must submit a consolidated B-BBEE status level verification certificate for every separate tender.
- 6.8 Tertiary institutions and public entities will be required to submit their B-BBEE status level certificates in terms of the specialized scorecard contained in the B-BBEE Codes of Good Practice.

## 7. BID DECLARATION

- 7.1 Bidders who claim points in respect of B-BBEE Status Level of Contribution must complete the following:

## 8. B-BBEE STATUS LEVEL OF CONTRIBUTION CLAIMED IN TERMS OF PARAGRAPH 6

- 8.1 B-BBEE Status Level of Contribution..... = ..... (maximum of 20 points)

**(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 6.1 and must be substantiated by means of a B-BBEE certificate issued by a Verification Agency accredited by SANAS or an affidavit confirming annual total revenue and level of black ownership in terms of the relevant sector code applicable to the tender.**

## 9. SUB-CONTRACTING

- 9.1 Will any portion of the contract be sub-contracted? YES/NO (delete which is not applicable)

- 9.1.1 If yes, indicate:

- (i) what percentage of the contract will be subcontracted? .....%
- (ii) the name of the sub-contractor? .....
- (iii) the B-BBEE status level of the sub-contractor? .....
- (iv) whether the sub-contractor is an EME or QSE? YES/NO (delete which is not applicable)

- 9.1.2 Sub-contracting relates to a particular contract and if sub-contracting is applicable, the bidder to state in their response to a particular RFQ that a portion of that contract will be sub-contracted.

## 10. DECLARATION WITH REGARD TO COMPANY/FIRM

- 10.1 Name of company/ entity : .....
- 10.2 VAT registration number : .....
- 10.3 Company Registration number : .....

#### 10.4 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 [SELECT APPLICABLE ONE]

10.5 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBEE status level of contribution indicated in paragraph 7 above, qualifies the company/ firm for the preference(s) shown and I/we acknowledge that:

- a) The Western Cape Government reserves the right to audit the B-BBEE status claim submitted by the bidder.
- b) As set out in Section 13O of the B-BBEE Act as amended, any misrepresentation constitutes a criminal offence. A person commits an offence if that person knowingly:
  - (i) misrepresents or attempts to misrepresent the B-BBEE status of an enterprise;
  - (ii) provides false information or misrepresents information to a B-BBEE Verification Professional in order to secure a particular B-BBEE status or any benefit associated with compliance to the B-BBEE Act;
  - (iii) provides false information or misrepresents information relevant to assessing the B-BBEE status of an enterprise to any organ of state or public entity; or
  - (iv) engages in a fronting practice.
- c) If a B-BBEE verification professional or any procurement officer or other official of an organ of state or public entity becomes aware of the commission of, or any attempt to commit any offence referred to in paragraph 10.5 (a) above will be reported to an appropriate law enforcement agency for investigation.
- d) Any person convicted of an offence by a court is liable in the case of contravention of 10.5 (b) to a fine or to imprisonment for a period not exceeding 10 years or to both a fine and such imprisonment or, if the convicted person is not a natural person to a fine not exceeding 10 per cent of its annual turnover.
- e) The purchaser may, if it becomes aware that a bidder may have obtained its B-BBEE status level of contribution on a fraudulent basis, investigate the matter. Should the investigation warrant a restriction be imposed, this will be referred to the National Treasury for investigation, processing and imposing the restriction on the National Treasury's List of Restricted Suppliers. The bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, may 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.

- (f) The purchaser may, in addition to any other remedy it may have –
- (i) disqualify the person from the bidding process;
  - (ii) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
  - (iii) 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; and
  - (iv) forward the matter for criminal prosecution.
- (g) The information furnished is true and correct.
- (h) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 2 of this form.

**SIGNATURE(S) OF THE BIDDER(S):** .....

**DATE:** .....

**ADDRESS:** .....

.....

**WITNESSES:**

1. ....

2. ....

**THE NATIONAL TREASURY**  
**Republic of South Africa**



**GOVERNMENT PROCUREMENT**

**GENERAL CONDITIONS OF CONTRACT**

**July 2010**

# **GOVERNMENT PROCUREMENT GENERAL CONDITIONS OF CONTRACT July 2010**

## **NOTES**

The purpose of this document is to:

- (i) Draw special attention to certain general conditions applicable to government bids, contracts and orders; and
- (ii) To ensure that clients be familiar with regard to the rights and obligations of all parties involved in doing business with government.

In this document words in the singular also mean in the plural and vice versa and words in the masculine also mean in the feminine and neuter.

- The General Conditions of Contract will form part of all bid documents and may not be amended.
- Special Conditions of Contract (SCC) relevant to a specific bid, should be compiled separately for every bid (if applicable) and will supplement the General Conditions of Contract. Whenever there is a conflict, the provisions in the SCC shall prevail.

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## General Conditions of Contract

### 1. Definitions

1. The following terms shall be interpreted as indicated:
  - 1.1 "Closing time" means the date and hour specified in the bidding documents for the receipt of bids.
  - 1.2 "Contract" means the written agreement entered into between the purchaser and the supplier, as recorded in the contract form signed by the parties, including all attachments and appendices thereto and all documents incorporated by reference therein.
  - 1.3 "Contract price" means the price payable to the supplier under the contract for the full and proper performance of his contractual obligations.
  - 1.4 "Corrupt practice" means the offering, giving, receiving, or soliciting of anything of value to influence the action of a public official in the procurement process or in contract execution.
  - 1.5 "Countervailing duties" are imposed in cases where an enterprise abroad is subsidized by its government and encouraged to market its products internationally.
  - 1.6 "Country of origin" means the place where the goods were mined, grown or produced or from which the services are supplied. Goods are produced when, through manufacturing, processing or substantial and major assembly of components, a commercially recognized new product results that is substantially different in basic characteristics or in purpose or utility from its components.
  - 1.7 "Day" means calendar day.
  - 1.8 "Delivery" means delivery in compliance of the conditions of the contract or order.
  - 1.9 "Delivery ex stock" means immediate delivery directly from stock actually on hand.
  - 1.10 "Delivery into consignees store or to his site" means delivered and unloaded in the specified store or depot or on the specified site in compliance with the conditions of the contract or order, the supplier bearing all risks and charges involved until the supplies are so delivered and a valid receipt is obtained.
  - 1.11 "Dumping" occurs when a private enterprise abroad market its goods on own initiative in the RSA at lower prices than that of the country of origin and which have the potential to harm the local industries in the RSA.

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- 1.12" Force majeure" means an event beyond the control of the supplier and not involving the supplier's fault or negligence and not foreseeable. Such events may include, but is not restricted to, acts of the purchaser in its sovereign capacity, wars or revolutions, fires, floods, epidemics, quarantine restrictions and freight embargoes.
- 1.13 "Fraudulent practice" means a misrepresentation of facts in order to influence a procurement process or the execution of a contract to the detriment of any bidder, and includes collusive practice among bidders (prior to or after bid submission) designed to establish bid prices at artificial non-competitive levels and to deprive the bidder of the benefits of free and open competition.
- 1.14 "GCC" means the General Conditions of Contract.
- 1.15 "Goods" means all of the equipment, machinery, and/or other materials that the supplier is required to supply to the purchaser under the contract.
- 1.16 "Imported content" means that portion of the bidding price represented by the cost of components, parts or materials which have been or are still to be imported (whether by the supplier or his subcontractors) and which costs are inclusive of the costs abroad, plus freight and other direct importation costs such as landing costs, dock dues, import duty, sales duty or other similar tax or duty at the South African place of entry as well as transportation and handling charges to the factory in the Republic where the supplies covered by the bid will be manufactured.
- 1.17 "Local content" means that portion of the bidding price which is not included in the imported content provided that local manufacture does take place.
- 1.17 "Manufacture" means the production of products in a factory using labour, materials, components and machinery and includes other related value-adding activities.
- 1.19 "Order" means an official written order issued for the supply of goods or works or the rendering of a service.
- 1.20 "Project site," where applicable, means the place indicated in bidding documents.
- 1.21 "Purchaser" means the organization purchasing the goods.
- 1.22 "Republic" means the Republic of South Africa.

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1.23 "SCC" means the Special Conditions of Contract.

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

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

## **2. Application**

2.1 These general conditions are applicable to all bids, contracts and orders including bids for functional and professional services, sales, hiring, letting and the granting or acquiring of rights, but excluding immovable property, unless otherwise indicated in the bidding documents.

2.2 Where applicable, special conditions of contract are also laid down to cover specific supplies, services or works.

a. Where such special conditions of contract are in conflict with these general conditions, the special conditions shall apply.

## **3. General**

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

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

## **4. Standards**

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

## **5. Use of contract documents and information; inspection.**

5.1 The supplier shall not, without the purchaser's prior written consent, disclose the contract, or any provision thereof, or any specification, plan, drawing, pattern, sample, or information furnished by or on behalf of the purchaser in connection therewith, to any person other than a person employed by the supplier in the performance of the contract. Disclosure to any such employed person shall be made in confidence and shall extend only so far as may be necessary for purposes of such performance.

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- 5.2 The supplier shall not, without the purchaser's prior written consent, make use of any document or information mentioned in GCC clause 5.1 except for purposes of performing the contract.
- 5.3 Any document, other than the contract itself mentioned in GCC clause 5.1 shall remain the property of the purchaser and shall be returned (all copies) to the purchaser on completion of the supplier's performance under the contract if so, required by the purchaser.
- 5.4 The supplier shall permit the purchaser to inspect the supplier's records relating to the performance of the supplier and to have them audited by auditors appointed by the purchaser, if so, required by the purchaser.

#### **6. Patent rights**

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

#### **7. Performance security**

- 7.1 Within thirty (30) days of receipt of the notification of contract award, the successful bidder shall furnish to the purchaser the performance security of the amount specified in SCC.
- 7.2 The proceeds of the performance security shall be payable to the purchaser as compensation for any loss resulting from the supplier's failure to complete his obligations under the contract.
- 7.3 The performance security shall be denominated in the currency of the contract, or in a freely convertible currency acceptable to the purchaser and shall be in one of the following forms:
  - (a) a bank guarantee or an irrevocable letter of credit issued by a reputable bank located in the purchaser's country or abroad, acceptable to the purchaser, in the form provided in the bidding documents or another form acceptable to the purchaser; or
  - (b) a cashier's or certified cheque
- 7.4 The performance security will be discharged by the purchaser and returned to the supplier not later than thirty (30) days following the date of completion of the supplier's performance obligations under the contract, including any warranty obligations, unless otherwise specified in SCC.

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**8. Inspections,  
tests and  
analyses**

- 8.1 All pre-bidding testing will be for the account of the bidder.
- 8.2 If it is a bid condition that supplies to be produced or services to be rendered should at any stage during production or execution or on completion be subject to inspection, the premises of the bidder or contractor shall be open, at all reasonable hours, for inspection by a representative of the Department or an organization acting on behalf of the Department.
- 8.3 If there are no inspection requirements indicated in the bidding documents and no mention is made in the contract, but during the contract period it is decided that inspections shall be carried out, the purchaser shall itself make the necessary arrangements, including payment arrangements with the testing authority concerned.
- 8.4 If the inspections, tests and analyses referred to in clauses 8.2 and 8.3 show the supplies to be in accordance with the contract requirements, the cost of the inspections, tests and analyses shall be defrayed by the purchaser.
- 8.5 Where the supplies or services referred to in clauses 8.2 and 8.3 do not comply with the contract requirements, irrespective of whether such supplies or services are accepted or not, the cost in connection with these inspections, tests or analyses shall be defrayed by the supplier.
- 8.6 Supplies and services which are referred to in clauses 8.2 and 8.3 and which do not comply with the contract requirements may be rejected.
- 8.7 Any contract supplies may on or after delivery be inspected, tested or analyzed and may be rejected if found not to comply with the requirements of the contract. Such rejected supplies shall be held at the cost and risk of the supplier who shall, when called upon, remove them immediately at his own cost and forthwith substitute them with supplies which do comply with the requirements of the contract. Failing such removal, the rejected supplies shall be returned at the suppliers cost and risk. Should the supplier fail to provide the substitute supplies forthwith, the purchaser may, without giving the supplier further opportunity to substitute the rejected supplies, purchase such supplies as may be necessary at the expense of the supplier.
- 8.8 The provisions of clauses 8.4 to 8.7 shall not prejudice the right of the purchaser to cancel the contract on account of a breach of the conditions thereof, or to act in terms of Clause 23 of GCC.

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**9. Packing**

- 9.1 The supplier shall provide such packing of the goods as is required to prevent their damage or deterioration during transit to their final destination, as indicated in the contract. The packing shall be sufficient to withstand, without limitation, rough handling during transit and exposure to extreme temperatures, salt and precipitation during transit, and open storage. Packing, case size and weights shall take into consideration, where appropriate, the remoteness of the goods' final destination and the absence of heavy handling facilities at all points in transit.
- 9.2 The packing, marking, and documentation within and outside the packages shall comply strictly with such special requirements as shall be expressly provided for in the contract, including additional requirements, if any, specified in SCC, and in any subsequent instructions ordered by the purchaser.

**10. Delivery and documents**

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

**11. Insurance**

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

**12. Transportation**

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

**13. Incidental services**

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

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

#### **14. Spare parts**

- 14.1 As specified in SCC, the supplier may be required to provide any or all of the following materials, notifications, and information pertaining to spare parts manufactured or distributed by the supplier:
- (a) such spare parts as the purchaser may elect to purchase from the supplier, provided that this election shall not relieve the supplier of any warranty obligations under the contract; and
  - (b) in the event of termination of production of the spare parts:
    - (i) Advance notification to the purchaser of the pending termination, in sufficient time to permit the purchaser to procure needed requirements; and
    - (ii) following such termination, furnishing at no cost to the purchaser, the blueprints, drawings, and specifications of the spare parts, if requested.

#### **15. Warranty**

- 15.1 The supplier warrants that the goods supplied under the contract are new, unused, of the most recent or current models, and that they incorporate all recent improvements in design and materials unless provided otherwise in the contract. The supplier further warrants that all goods supplied under this contract shall have no defect, arising from design, materials, or workmanship (except when the design and/or material is required by the purchaser's specifications) or from any act or omission of the supplier, that may develop under normal use of the supplied goods in the conditions prevailing in the country of final destination.
- 15.2 This warranty shall remain valid for twelve (12) months after the goods, or any portion thereof as the case may be, have been delivered to and accepted at the final destination indicated in the contract, or for eighteen (18) months after the date of shipment from the port or place of loading in the source country, whichever period concludes earlier, unless specified otherwise in SCC.
- 15.3 The purchaser shall promptly notify the supplier in writing of any claims arising under this warranty.
- 15.4 Upon receipt of such notice, the supplier shall, within the period specified in SCC and with all reasonable speed, repair or replace the defective goods or parts thereof, without costs to the purchaser.

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

**16. Payment**

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

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

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

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

**17. Prices**

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

**21. Contract amendments**

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

**19. Assignment**

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

**20. Subcontracts**

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

**21. Delays in the supplier's performance**

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

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- 22.1 If at any time during performance of the contract, the supplier or its subcontractor(s) should encounter conditions impeding timely delivery of the goods and performance of services, the supplier shall promptly notify the purchaser in writing of the fact of the delay, its likely duration and its cause(s). As soon as practicable after receipt of the supplier's notice, the purchaser shall evaluate the situation and may at his discretion extend the supplier's time for performance, with or without the Imposition of penalties, in which case the extension shall be ratified by the parties by amendment of contract.
- 22.1 No provision in a contract shall be deemed to prohibit the obtaining of supplies or services from a national department, provincial department, or a local authority.
- 22.1 The right is reserved to procure outside of the contract small quantities or to have minor essential services executed if an emergency arises, the supplier's point of supply is not situated at or near the place where the supplies are required, or the supplier's services are not readily available.
- 21.5 Except as provided under GCC Clause 25, a delay by the supplier in the performance of its delivery obligations shall render the supplier liable to the imposition of penalties, pursuant to GCC Clause 22, unless an extension of time is agreed upon pursuant to GCC Clause 21.2 without the application of penalties.
- 22.1 Upon any delay beyond the delivery period in the case of a supplies contract, the purchaser shall, without cancelling the contract, be entitled to purchase supplies of a similar quality and up to the same quantity in substitution of the goods not supplied in conformity with the contract and to return any goods delivered later at the supplier's expense and risk, or to cancel the contract and buy such goods as may be required to complete the contract and without prejudice to his other rights, be entitled to claim damages from the supplier.

## **22. Penalties**

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

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### **23. Termination for default**

- 23.1 The purchaser, without prejudice to any other remedy for breach of contract, by written notice of default sent to the supplier, may terminate this contract in whole or in part:
- (a) if the supplier fails to deliver any or all of the goods within the period(s) specified in the contract, or within any extension thereof granted by the purchaser pursuant to GCC Clause 21.2;
  - (b) if the Supplier fails to perform any other obligation(s) under the contract; or
  - (c) if the supplier, in the judgment of the purchaser, has engaged in corrupt or fraudulent practices in competing for or in executing the contract.
- 23.2 In the event the purchaser terminates the contract in whole or in part, the purchaser may procure, upon such terms and in such manner as it deems appropriate, goods, works or services similar to those undelivered, and the supplier shall be liable to the purchaser for any excess costs for such similar goods, works or services. However, the supplier shall continue performance of the contract to the extent not terminated.
- 23.3 Where the purchaser terminates the contract in whole or in part, the purchaser may decide to impose a restriction penalty on the supplier by prohibiting such supplier from doing business with the public sector for a period not exceeding 10 years.
- 23.4 If a purchaser intends imposing a restriction on a supplier or any person associated with the supplier, the supplier will be allowed a time period of not more than fourteen (14) days to provide reasons why the envisaged restriction should not be imposed. Should the supplier fail to respond within the stipulated fourteen (14) days the purchaser may regard the intended penalty as not objected against and may impose it on the supplier.
- 23.5 Any restriction imposed on any person by the Accounting Officer / Authority will, at the discretion of the Accounting Officer / Authority, also be applicable to any other enterprise or any partner, manager, director or other person who wholly or partly exercises or exercised or may exercise control over the
- enterprise of the first-mentioned person, and with which enterprise or person the first-mentioned person, is or was in the opinion of the Accounting Officer / Authority actively associated.
- 23.6 If a restriction is imposed, the purchaser must, within five (5) working days of such imposition, furnish the National Treasury, with the following information:
- (i) the name and address of the supplier and / or person restricted by the purchaser;
  - (ii) the date of commencement of the restriction
  - (iii) the period of restriction; and
  - (iv) the reasons for the restriction.

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

- 23.7 If a court of law convicts a person of an offence as contemplated in sections 12 or 13 of the Prevention and Combating of Corrupt Activities Act, No. 12 of 2004, the court may also rule that such person's name be endorsed on the Register for Tender Defaulters. When a person's name has been endorsed on the Register, the person will be prohibited from doing business with the public sector for a period not less than five years and not more than 10 years.

The National Treasury is empowered to determine the period of restriction and each case will be dealt with on its own merits. According to section 32 of the Act the Register must be open to the public. The Register can be perused on the National Treasury website.

#### **24. Anti-dumping and countervailing duties and rights**

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

#### **25. Force Majeure**

- 25.1 Notwithstanding the provisions of GCC Clauses 22 and 23, the supplier shall not be liable for forfeiture of its performance security, damages, or termination for default if and to the extent that his delay in performance or other failure to perform his obligations under the contract is the result of an event of force majeure.
- 25.2 If a force majeure situation arises, the supplier shall promptly notify the purchaser in writing of such condition and the cause thereof. Unless otherwise directed by the purchaser in writing, the supplier shall continue to perform its obligations under the contract as far as is reasonably practical, and shall seek all reasonable alternative means for performance not prevented by the force majeure event.

#### **26. Termination for insolvency**

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

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**27. Settlement of Disputes**

- 27.1 If any dispute or difference of any kind whatsoever arises between the purchaser and the supplier in connection with or arising out of the contract, the parties shall make every effort to resolve amicably such dispute or difference by mutual consultation.
- 30.1 If, after thirty (30) days, the parties have failed to resolve their dispute or difference by such mutual consultation, then either the purchaser or the supplier may give notice to the other party of his intention to commence with mediation. No mediation in respect of this matter may be commenced unless such notice is given to the other party.
- 27.3 Should it not be possible to settle a dispute by means of mediation, it may be settled in a South African court of law.
- 27.4 Mediation proceedings shall be conducted in accordance with the rules of procedure specified in the SCC.
- 30.1 Notwithstanding any reference to mediation and/or court proceedings herein,
- (a) the parties shall continue to perform their respective obligations under the contract unless they otherwise agree; and
- (b) the purchaser shall pay the supplier any monies due the supplier.

**28. Limitation of liability**

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

**29. Governing language**

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

**30. Applicable law**

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

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### 31. Notices

- 31.1 Every written acceptance of a bid shall be posted to the supplier concerned by registered or certified mail and any other notice to him shall be posted by ordinary mail to the address furnished in his bid or to the address notified later by him in writing and such posting shall be deemed to be proper service of such notice
- 31.2 The time mentioned in the contract documents for performing any act after such aforesaid notice has been given, shall be reckoned from the date of posting of such notice.

### 32. Taxes and duties

- 32.1 A foreign supplier shall be entirely responsible for all taxes, stamp duties, license fees, and other such levies imposed outside the purchaser's country.
- 32.2 A local supplier shall be entirely responsible for all taxes, duties, license fees, etc., incurred until delivery of the contracted goods to the purchaser.
- 32.3 No contract shall be concluded with any bidder whose tax matters are not in order. Prior to the award of a bid the Department must be in possession of a tax clearance certificate submitted by the bidder.

This certificate must be an original issued by the South African Revenue Services.

### 33. National Industrial Participation (NIP) Programme

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

### 34. Prohibition of Restrictive practices

- 34.1 In terms of section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, an agreement between, or concerted practice by, firms, or a decision by an association of firms, is prohibited if it is between parties in a horizontal relationship and if a bidder (s) is / are or a contractor(s) was / were involved in collusive bidding (or bid rigging).
- 34.2 If a bidder(s) or contractor(s), based on reasonable grounds or evidence obtained by the purchaser, has / have engaged in the restrictive practice referred to above, the purchaser may refer the matter to the Competition Commission for investigation and possible imposition of administrative penalties as contemplated in the Competition Act No. 89 of 1998.
- 34.3 If a bidder(s) or contractor(s), has / have been found guilty by the Competition Commission of the restrictive practice referred to above, the purchaser may, in addition and without prejudice to any other remedy provided for, invalidate the bid(s) for such item(s) offered, and / or terminate the contract in whole or part, and / or restrict the bidder(s) or contractor(s) from conducting business with the public sector for a period not exceeding ten (10) years and / or claim damages from the bidder(s) or contractor(s) concerned.

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**ANNEXURE A: COMPANY EXPERTISE TABLE**

**Company Name:** \_\_\_\_\_

Please indicate the number of consultants on your team with master's or doctoral qualifications and the total years of experience for each of your fields of expertise that are listed in column one below. If, for example, your organization has two team members with master's degrees and one with a doctoral degree in (socio) economic surveys and other research methods, including the lead consultant, then 2 and 1 can be inserted in the appropriate row and columns. If these three members have a combined 15 years of postgraduate work experience in this field, the 15 are inserted in the appropriate cell.

| Field of Expertise                                                                                                                                         | Number of Members with Advanced Qualifications (per field) |          | Total Years of Experience per field |
|------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------|----------|-------------------------------------|
|                                                                                                                                                            | Masters                                                    | Doctoral |                                     |
| Surveys and other research methods for (socio) economic & doing business information                                                                       |                                                            |          |                                     |
| Sectoral, industrial and labour market analyses.                                                                                                           |                                                            |          |                                     |
| Entrepreneurship and enterprise development; Micro, Small, Medium Enterprise (MSME) strategies, township economic development and/or the informal economy. |                                                            |          |                                     |
| Econometric and other economic modelling.                                                                                                                  |                                                            |          |                                     |
| Macro and micro economic impact assessments including Cost Benefit Analysis.                                                                               |                                                            |          |                                     |
| Programme evaluation research as prescribed in the National Evaluation Policy Framework.                                                                   |                                                            |          |                                     |
| Red-tape reduction, regulatory reform, regulatory impact assessments (RIAs).                                                                               |                                                            |          |                                     |
| Economic development and competitiveness indicators and indexes.                                                                                           |                                                            |          |                                     |
| Analytical capacity to rank project options.                                                                                                               |                                                            |          |                                     |
| Research and planning for provincial, regional & local growth and Development.                                                                             |                                                            |          |                                     |
| Research and planning on spatial constraints and implications for economic development.                                                                    |                                                            |          |                                     |
| Promotion of economic resilience and sustainability                                                                                                        |                                                            |          |                                     |
| Strategic and/or technical advice and opinion on legislation, regulations and policies.                                                                    |                                                            |          |                                     |



|                                                                                                                                                                              |  |  |  |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|--|
| Strategies to mitigate or circumvent barriers to economic growth and job creation.                                                                                           |  |  |  |
| Comparisons of legislation, regulations & policies affecting economic growth and job creation.                                                                               |  |  |  |
| Key and/or emerging economic issues such as R&D and innovation, technology disruption, AI and machine learning and the application of principles from behavioural economics. |  |  |  |
| International best practice and benchmarking regarding economic development promotion.                                                                                       |  |  |  |
| Implementation plans for specific areas of work as specified above.                                                                                                          |  |  |  |
| Advise on the quality, limitations and appropriate uses of research.                                                                                                         |  |  |  |
| Act as an independent peer reviewer of research outputs.                                                                                                                     |  |  |  |