

**PART A
INVITATION TO BID**

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF MUNICIPALITY/ MUNICIPAL ENTITY)					
BID NUMBER:	TEDA BID: BID: 01/08/26	CLOSING DATE	29 October 2026	CLOSING TIME:	11:00 am
DESCRIPTION	THE APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE A COMPREHENSIVE EMPLOYEE WELLNESS PROGRAMME FOR A PERIOD OF (3) THREE YEARS FOR TEDA.				
THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (MBD7).					

BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX
SITUATED AT (STREET ADDRESS)

Bid Validity 90 days

TSHWANE ECONOMIC DEVELOPMENT AGENCY (TEDA)
BLOCK C, CENTURION MUNICIPAL BUILDING
BASDEN AVENUE AND RABIE STREET
LYTTELTON, CENTURION
0163

SUPPLIER INFORMATION

NAME OF BIDDER				
POSTAL ADDRESS				
STREET ADDRESS				
TELEPHONE NUMBER	CODE		NUMBER	
CELLPHONE NUMBER				
FACSIMILE NUMBER	CODE		NUMBER	
E-MAIL ADDRESS				
VAT REGISTRATION NUMBER				
TAX COMPLIANCE STATUS	TCS PIN:		OR	CSD No:
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE [TICK APPLICABLE BOX]	☐ Yes ☐ No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT ☐ Yes ☐ No	

[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]

ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	☐ Yes ☐ No [IF YES ENCLOSE PROOF]	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	☐ Yes ☐ No [IF YES, ANSWER PART B:3]
TOTAL NUMBER OF ITEMS OFFERED		TOTAL BID PRICE	N/A
SIGNATURE OF BIDDER		DATE	
CAPACITY UNDER WHICH THIS BID IS SIGNED			

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO:		TECHNICAL INFORMATION MAY BE DIRECTED TO:	
DEPARTMENT	TEDA	CONTACT PERSON	Masiloma Maepa
CONTACT PERSON	Mokgadi Mapokane	TELEPHONE NUMBER	012-358-6550
TELEPHONE NUMBER	012-358 6539	FACSIMILE NUMBER	N/A
FACSIMILE NUMBER	N/A	E-MAIL ADDRESS	masiloma2@tshwane.gov.za
E-MAIL ADDRESS	mokgadima@tshwane.gov.za		

PART B TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:
1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION. 1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED– (NOT TO BE RE-TYPED) OR ONLINE 1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
2. TAX COMPLIANCE REQUIREMENTS
2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS. 2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VIEW THE TAXPAYER'S PROFILE AND TAX STATUS. 2.3 APPLICATION FOR THE TAX COMPLIANCE STATUS (TCS) CERTIFICATE OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE WWW.SARS.GOV.ZA. 2.4 FOREIGN SUPPLIERS MUST COMPLETE THE PRE-AWARD QUESTIONNAIRE IN PART B:3. 2.5 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID. 2.6 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER. 2.7 WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS
3.1. IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? ☐ YES ☐ NO 3.2. DOES THE ENTITY HAVE A BRANCH IN THE RSA? ☐ YES ☐ NO 3.3. DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA? ☐ YES ☐ NO 3.4. DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA? ☐ YES ☐ NO 3.5. IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? ☐ YES ☐ NO IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 ABOVE.

**NB: FAILURE TO PROVIDE ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.
NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE.**

SIGNATURE OF BIDDER:

CAPACITY UNDER WHICH THIS BID IS SIGNED:

DATE:

MB3.3: PRICING SCHEDULE FIRM PRICES

ONLY FIRM PRICES WILL BE ACCEPTED. NON-FIRM PRICES (INCLUDING PRICES SUBJECT TO RATE OF EXCHANGE VARIATIONS) WILL NOT BE CONSIDERED

BID NO: 01/08/26

CLOSING DATE: 29 OCTOBER 2026

VALIDITY PERIOD: 90 DAYS

CLOSING TIME: 11:00 AM

EMPLOYEE WELLNESS CONTRACT BASED ON AN ESTIMATE OF 55 STAFF MEMBERS

Item	Description / Service	Unit	Number of employees	Total (Incl. VAT)
1.	Employee Wellness Programme management including activities listed on Par1.1 below:	Rate per Month per for all employees including family members	55	(Comparative price) 55 X R.... per month Inclusive of all cost R
1.1	Individual counselling sessions			
	Trauma/debriefing interventions			
	Psychological assessments			
	Financial wellness counselling			
	Legal advice/counselling			
	Substance-abuse counselling			
	Wellness days / onsite activations			
	HIV/AIDS and health awareness services			
	Managerial consultation/support			
	Critical incident response			
	Monthly management/reporting			
	24-hour EWP helpline			
2.	NB: Employee Wellness activities must be quoted for on an ad-hoc basis and separately from the main contract. Such activities must therefore not be included in the monthly retainer fee. Prior written approval, in the form of an authorised Purchase Order (PO), must be obtained before the contracted service provider may render any Employee Wellness activity or related service outside the scope of the monthly retainer.			
3.	Price adjustment: Rate quoted must be firm for the period of the contract.			
4.	Quoted Price to be inclusive of VAT and all disbursements			

TERMS OF REFERENCE: 01-08-26

APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE EMPLOYEE WELLNESS PROGRAMME (EWP) SERVICES

1. Purpose

The purpose of this Terms of Reference (ToR) is to appoint a suitably qualified and experienced service provider to provide comprehensive Employee Wellness Programme (EWP) services to the employees of the Tshwane Economic Development Agency (TEDA).

The appointed service provider will be required to provide accessible, confidential, professional and integrated wellness interventions aimed at supporting employees' physical, emotional, psychological, social, financial and occupational well-being.

The EWP is intended to complement TEDA's existing human-resource and organisational-support initiatives and to promote a healthy, productive and resilient workforce.

2. Background

Tshwane Economic Development Agency (TEDA) is an entity of the City of Tshwane mandated to contribute towards economic development, investment promotion and related economic development initiatives.

TEDA recognises that employee wellness is an important component of organisational effectiveness, employee engagement, productivity and business continuity. Employees may experience personal, family, financial, emotional, psychological, social and work-related challenges that can affect their well-being and performance.

TEDA therefore intends to appoint a suitably qualified EWP service provider to provide professional wellness support to employees and, where applicable, their immediate family members.

The programme must be sufficiently flexible to respond to the changing needs of the organisation and must include both reactive support, where employees require assistance with identified challenges, and proactive interventions aimed at prevention, awareness and early identification of wellness-related risks.

3. Objectives of the EWP

The key objectives of the EWP are to:

3.1 Provide employees with confidential, professional and easily accessible wellness services.

3.2 Promote the physical, emotional, psychological, social, financial and occupational well-being of employees.

3.3 Provide early intervention and appropriate support to employees experiencing personal or work-related challenges.

APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE EMPLOYEE WELLNESS PROGRAMME (EWP) SERVICES

3.4 Assist employees to manage stress, work-life challenges, interpersonal difficulties, grief, trauma and other circumstances that may affect their well-being.

3.5 Promote healthy lifestyle choices and preventative wellness practices.

3.6 Support employees in maintaining a healthy balance between their personal and professional responsibilities.

3.7 Contribute towards improved employee morale, engagement, productivity and attendance.

3.8 Provide management with appropriate, aggregated and non-identifiable wellness information to assist with organisational planning and preventative interventions.

3.9 Facilitate referrals to appropriate professional or specialist services where matters fall outside the scope of the EWP.

3.10 Provide wellness education and awareness programmes relevant to the needs of TEDA employees.

4. Scope of Services

The appointed service provider will be responsible for providing an integrated EWP offering, which should, as a minimum, include the following:

4.1 Employee Assistance Services

The service provider must provide confidential counselling and support to employees and eligible dependants, where applicable, including:

- Individual counselling;
- Telephone and/or virtual counselling;
- Face-to-face counselling where required;
- Psychological and emotional support;
- Stress and anxiety management;
- Grief and bereavement counselling;
- Trauma support;
- Relationship and family-related counselling;
- Work-related challenges;
- Conflict management;
- Adjustment and life-transition support; and
- Other reasonable employee assistance interventions.

4.2 Financial Wellness

The service provider should provide financial wellness support and education, including:

- Financial counselling;
- Personal financial management;
- Budgeting and debt-management guidance;
- Financial literacy;
- Retirement and financial planning awareness;
- Responsible credit management; and
- Referral to appropriately qualified financial professionals where necessary.

4.3 Legal and Related Assistance

Where included in the service offering, employees should have access to general legal information and assistance on matters that may affect their personal well-being, with specialist referrals where necessary.

4.4 Health and Lifestyle Wellness

The service provider must provide or facilitate appropriate health and lifestyle interventions, which may include:

- Wellness awareness campaigns;
- Healthy lifestyle education;
- Nutrition and healthy eating awareness;
- Physical activity and fitness awareness;
- Substance-abuse awareness;
- Chronic lifestyle-related condition awareness;
- Preventative health information; and
- Other relevant wellness initiatives.

The service provider must not provide medical diagnosis or treatment outside the scope of its professional accreditation and applicable legislation.

4.5 Occupational Wellness

The service provider should support interventions relating to the workplace environment, including:

- Workplace stress;
- Burnout prevention;

- Work-life balance;
- Interpersonal relationships;
- Team dynamics;
- Change management;
- Resilience and coping mechanisms;
- Employee engagement; and
- Other workplace wellness matters.

4.6 Managerial and Organisational Support

The service provider may be required to provide management support in relation to wellness-related matters, including:

- Manager consultations;
- Guidance on appropriate referral of employees;
- Critical incident support;
- Trauma interventions;
- Organisational wellness assessments;
- Team interventions; and
- Wellness-related awareness sessions.

No employee-specific confidential information may be disclosed to management without the employee's informed consent, except where disclosure is required by law or where there is an immediate and lawful duty to disclose.

4.7 Critical Incident and Trauma Support

The service provider must be able to provide timely support following critical incidents affecting employees or the organisation.

Such support may include:

- Psychological first aid;
- Trauma counselling;
- Debriefing and support sessions;
- Individual counselling;
- Group interventions; and
- Referral to specialist services where required.

4.8 Wellness Awareness and Education

The service provider must develop and implement a wellness awareness programme aligned with TEDA's operational requirements.

Awareness interventions may include seminars, workshops, campaigns, webinars, information sessions, newsletters and other appropriate communication channels.

5. Service Delivery Requirements

The appointed service provider must:

- 5.1 Provide services to all eligible TEDA employees in accordance with the agreed service model.
- 5.2 Provide multiple access channels, which should include telephone, electronic/online and face-to-face services where appropriate.
- 5.3 Maintain an appropriate call-centre or contact mechanism for employee assistance.
- 5.4 Ensure that services are available during normal working hours and provide an appropriate after-hours or emergency support mechanism where required.
- 5.5 Ensure that employees can access services without unnecessary administrative barriers.
- 5.6 Ensure that all counselling and wellness services are provided by appropriately qualified professionals.
- 5.7 Ensure that service delivery is professional, non-discriminatory, culturally appropriate and respectful.
- 5.8 Provide services in accordance with agreed turnaround times and service levels.
- 5.9 Maintain appropriate referral mechanisms for matters requiring specialist intervention.
- 5.10 Provide services at TEDA premises, remotely or at another agreed location where operationally necessary.
- 5.11 Provide an implementation plan within the agreed period following contract commencement.
- 5.12 Ensure continuity of service throughout the contract period.
- 5.13 Ensure that the programme is scalable and capable of accommodating changes in the number of employees during the contract period.

6. Professional and Regulatory Requirements

The service provider must:

- 6.1 Be duly registered and legally authorised to provide the services.

6.2 Ensure that all professionals deployed to provide services are appropriately qualified and registered with the relevant statutory or professional bodies, where applicable.

6.3 Comply with all applicable South African legislation and professional standards governing the provision of wellness, counselling, psychological, financial, legal and related services.

6.4 Comply with the Protection of Personal Information Act, 2013 (POPIA), and all other applicable data-protection and privacy requirements.

6.5 Maintain strict confidentiality regarding all employee information and consultations.

6.6 Obtain appropriate consent before collecting, processing or sharing employee information.

6.7 Maintain secure systems for the storage, transmission and disposal of confidential information.

6.8 Ensure that all personnel providing services are bound by appropriate confidentiality and professional obligations.

6.9 Maintain appropriate professional indemnity and other insurance cover relevant to the services.

7. Technical Requirements

7.1 COUNSELLING TREATMENT AND EDUCATION ON THE FOLLOWING

- a) HIV and Aids
- b) TB
- c) Breast cancer
- d) Chronic illnesses- Diabetes-BP, Cholesterol etc.
- e) Other terminal illnesses
- f) Executive wellness and counselling programme
- g) 24/7 Toll-free line, direct unlimited multilingual telephone counselling services. Unlimited telephone counselling and advisory services (multilingual service and ability to render services to employees and their immediate family members anywhere within South Africa
- h) Face to face counselling and advisory services for up to 6 sessions per incident, viz. per problem irrespective of the number of problems presented by the employee
- i) Life management services including, personal finance, family care, healthy lifestyle promotion and legal advisory. Legal advisory services to include all areas of law except labour law and no court representation or bail application

7.2 MARITAL, FAMILY AND RELATIONSHIP PROGRAMME

7.2.1 THE INJURY ON DUTY (IOD) ADMINISTRATION PROCESSES FOR TEDA

- a) Assist with Incident Investigation and adjudication process
- b) Liaising with the Compensation Fund on all claim related issues
- c) Assessing employee readiness to resume their duties

7.2.2	FAMILY AND DOMESTIC VIOLENCE The Bidder must provide advice regarding any social dispute relating to among others marital issues, relationship issues etc.
7.2.3	SUBSTANCE ABUSE (ALCOHOL, DRUGS, PRESCRIPTION MEDICATION) AND OTHER ADDICTIVE BEHAVIOUR SUCH AS GAMBLING Inclusive of education, counselling and support and referral to appropriate resources for assistance
7.2.4	WORKPLACE VIOLENCE AND TRAUMA COUNSELLING Inclusive of Sexual harassment, bullying, and trauma debriefing (critical incident debriefing and trauma counselling for individuals and groups)
7.2.5	WORKPLACE VICTIMISATION AND DISCRIMINATION Inclusive of counselling and support and victim empowerment services
7.2.6	FINANCIAL WELLNESS INCLUDING: a) Financial planning and budgeting b) Estate planning c) Money saving and interest d) Debt counselling and Management e) Assist with completing tax returns. f) Consumer education/educational sessions on personal financial and debt management
7.2.7	STRESS MANAGEMENT (BOTH WORK AND PERSONAL) Including educational sessions for employees and counselling services
7.2.8	TRAUMA AND PSYCHOLOGICAL PROBLEMS a) Sexual harassment and abuse b) Death c) Hijackings etc. d) Bereavement counselling
7.2.9	DIVERSITY MANAGEMENT Including training/workshops and counseling and advisory services
7.2.10	ERGONOMIC RISK ASSESMENT AND ADVISORY ON AN AS AND WHEN REQUIRED BASIS ANY OTHER AREAS OF PERSONAL CONCERN APPROVED BY THE EWP COMMITTEE
7.12.11	ABSENTEEISM AND SUBSTANCE ABUSE Advisory on work attendance strategies and conduct sick leave audit once annually
7.2.12	COORDINATION OF WELLNESS DAY EVENT a) Blood Pressure/ Hypertension Monitoring b) Glucose/Diabetes Screening

APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE EMPLOYEE WELLNESS PROGRAMME (EWP) SERVICES

- c) Administration of TB Clinical Screening Questionnaire
- d) Administration of Sexual Transmitted Infections questionnaire
- e) HIV Counseling & Testing(HCT)
- f) Referral for Treatment
- g) Full cholesterol
- h) Diet & Nutritional Advise
- i) Body Mass Index/Obesity Screening
- j) Stress tests
- k) Employee Behavior Risk Assessment

4.16 OCCUPATIONAL HEALTH AND SAFETY OFFICES INCLUSIVE OF:

4.16.1. Conduct Hazard Identification and Risk Assessment (HIRA) at TEDA offices once annually

4.16.2. Medical Surveillance Programme for all employees

- a) A general medical questionnaire.
- b) An occupational history questionnaire.
- c) A hazard-specific questionnaire.
- d) A physical examination
- e) Special tests to include Vision Screening (eyesight, night sight and color), Audiometry, lung function test, urine dipstix
- f) Issuing of certificates of Fitness by an Occupational Medicine Doctor (CV and Qualifications (MBCHB and Postgraduate Diploma in Occupational Health/Medicine or master's degree in occupational health/medicine) of the Doctor and proof of registration with Health Professions Council to be submitted with the tender**

4.17. PROGRAMME MARKETING AND COMMUNICATION

The following media should be considered in regard to marketing and communications:

- a) EWP wallet card/information card to all employees once a year, including those for new employees.
- b) Leaflets during onsite health promotion initiatives
- c) Monthly electronic posters aligned to the National Health Observance Calendar
- d) Website (E-care online health portal), i.e., ongoing employee health promotion and information
- e) EWP brochures
- f) TEDA internal Wellness Days-health promotion sessions per invitation/Annual Implementation Plan
- g) Leaflets during onsite health promotion initiatives
- h) Email drops related to various topical wellness issues.

4.18. PROGRAMME AWARENESS SERVICES

- a) Employee Health and Wellness Induction Sessions for employees
 - Service offerings/referrals, eligibility, accessibility, confidentiality, programme contact information, e.g. dedicated toll free number, dedicated SMS ("please call me" number, dedicated email and access to e-care
- b) Line Managers Information Sessions/Training on EWP

4.19. EWP REPORTING AND PROGRAMME REVIEW

The reporting data provided shall include:

- a) Programme uptake and utilization proportion
- b) Statistics and Calculations
- c) Data Analysis
- d) Themes and Trends
- e) Value for money
- f) Benchmarking
- g) Conclusion and recommendations
- h) Skills Transfer (an indication of how the service provider has transferred skills to the TEDA's internal HR and Health and Safety Team)
- i) An annual review to provide an overall review of EWP services and discussions on organizational trends.
- j) Frequency of reports: Monthly, Quarterly, Annual and adhoc reports as required by TEDA. Reports to be presented to TEDA as and when required.
- k) Monthly/Quarterly programme review meetings

8. Implementation and Transition Plan

The successful bidder must provide an implementation and transition plan within the period stipulated by TEDA following appointment.

The plan must, as a minimum, address:

8.1 Mobilisation and commencement of services.

8.2 Introduction of the service provider and programme to TEDA employees.

8.3 Establishment of access channels and contact mechanisms.

8.4 Confirmation of the professional resources available to employees.

8.5 Development of an annual wellness awareness calendar.

8.6 Establishment of reporting and escalation mechanisms.

8.7 Integration with relevant TEDA human-resource processes, without compromising confidentiality.

APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE EMPLOYEE WELLNESS PROGRAMME (EWP) SERVICES

8.8 Transition arrangements at contract commencement and contract expiry.

8.9 Continuity arrangements to ensure that employees do not experience unnecessary interruption to services.

The service provider must ensure that the programme is operational within the agreed implementation period.

9. Contract Duration

The contract shall be for a period **36 months** commencing on the date stipulated in the appointment/contract documentation.

The contract period shall be subject to TEDA's applicable procurement policies, delegations, contractual conditions and budget availability.

Any adjustment to the number of employees covered by the EWP during the contract period shall be managed in accordance with the applicable pricing schedule and contractual provisions. The contract value shall accordingly be adjusted, where applicable, to reflect the actual number of employees added to or removed from the programme, subject to the approved contractual terms and procurement requirements.

10. Pricing and Payment

10.1 Bidders must provide a clear and comprehensive pricing schedule for the full range of services required.

10.2 Pricing must clearly indicate whether the proposed fee is:

- Per employee per month,
- A fixed monthly fee and
- A fixed annual fee.

10.3 Bidders must clearly identify all costs included in the proposed pricing and separately identify any services that may attract additional charges.

10.4 The pricing must include all costs necessary to deliver the required services, including professional resources, administration, communication platforms, reporting and agreed awareness interventions, unless specifically excluded.

10.5 Payment will be made in accordance with the agreed contractual terms upon receipt of a valid invoice and confirmation that the services have been rendered.

10.6 No additional services or costs may be charged without prior written approval from TEDA and, where applicable, compliance with the applicable procurement and contract-management requirements.

10.7 The bidder must indicate the financial implications of changes in the number of employees covered during the contract period.

10.8 Prices must remain valid for the period stipulated in the tender documentation and any permitted price adjustments must be dealt with in accordance with the contract.

11. Mandatory Compliance Requirements

Bidders must submit all documentation specified as mandatory in the tender invitation and bidding documentation.

Mandatory requirements may include, but are not limited to:

- Valid CSD registration;
- Company registration documentation;
- Valid B-BBEE certificate or sworn affidavit, as applicable;
- Proof of relevant professional registrations;
- Proof of relevant qualifications and experience;
- Completed and signed tender forms;
- Pricing schedule;
- Company profile; and
- Any other documentation expressly stipulated in the tender document.

Failure to submit a mandatory document or meet a mandatory requirement may result in the bid being disqualified from further evaluation, subject to the applicable SCM policy and tender conditions.

12. Functionality Evaluation

Bids that meet all mandatory requirements will be evaluated for functionality in accordance with the approved evaluation criteria and scoring methodology contained in the tender document.

The functionality evaluation may include the following areas:

Components of Tender to be evaluated	Evidence	Weighting
	Methodology, Knowledge and proven track record in respect of the subject matter. Bidders are advised of the following minimum requirements: • Knowledge to facilitate Employee Assistance Programme and management of injury on duty cases.	20

Knowledge and experience of the subject matter	Points allocation: • 30 points - for Excellent (covers all elements above as stated) • 20 points - for very Good (covers some elements above as stated) • 10 points - for Good (covers some elements stated above) • 0 points and below - not acceptable (covers no elements stated above or non-submission).	30
PREVIOUS EXPERIENCE <i>(refers to Bidder's past experience in delivering similar projects)</i>	At least six (6) references from Clients in their letterheads (Testimonial letters) of relevant or similar type of service Points allocation: • 20 points – Six references on company letterhead. • 15 points – Five references on company letterhead. • 10 points – Four references on company letterhead. • 5 points – Three references on company letterhead. • 0 points – Less than two references on company letterhead.	20
Experience and Skills of leading or professional assigned personnel in relation to the scope of work	Company/ wellness Experience (CV's of staff members with similar project experience) • Less than 2 reference = (Scale – 0 points) • 1-3 references = (Scale – 5 points) • 4-5 or more references = (Scale – 10 points) • 6 and above references = (Scale – 20 points) In support of the above, Bidders are to submit CV's of each staff member, which provides each member's experience in similar projects. The content of the CV's in terms of qualification and experience will be analysed. Points allocation:	20
	Location in Tshwane (Business Address) ☐ 10 points for Tshwane Business locality ☐ 5 points for outside Tshwane	10
TOTAL		100

The final functionality criteria, sub-criteria, minimum qualifying score and documentary evidence requirements must be approved and included in the tender document before the invitation is issued.

Bidders failing to achieve the stipulated minimum functionality score of **75** points will not proceed to the next stage of evaluation.

TEDA reserves the right to verify all information submitted by bidders, including references, qualifications, registrations and previous experience.

13. Conditions of Tender

13.1 The appointed service provider must comply with all TEDA policies, procedures, applicable SCM requirements and contractual conditions.

13.2 The service provider may not subcontract any material part of the services without the prior written approval of TEDA and subject to applicable procurement requirements.

13.3 Where subcontracting is approved, the appointed service provider remains fully responsible for the performance and conduct of its subcontractors.

13.4 The service provider must disclose any actual or potential conflict of interest.

13.5 The service provider must not use employee information obtained through the contract for any purpose other than the provision of the contracted services.

13.6 Employee participation in the EWP must be voluntary, except where participation is required by law or forms part of an agreed organisational intervention.

13.7 The service provider must ensure that the EWP does not discriminate against any employee on any prohibited ground.

13.8 TEDA reserves the right to request replacement of personnel where there are reasonable grounds relating to performance, professional conduct, confidentiality or compliance.

13.9 Any change to the proposed key personnel must be approved by TEDA and the replacement personnel must possess qualifications and experience at least equivalent to those of the personnel being replaced.

13.10 The service provider must maintain business continuity arrangements to ensure uninterrupted access to critical wellness services.

13.11 The service provider must immediately notify TEDA of any material incident that may affect service delivery, confidentiality, data security or contractual performance.

14. General Contractual Conditions

14.1 The appointment will be subject to TEDA's applicable SCM policies, procedures, delegations, standard tender conditions and contractual terms.

14.2 The successful bidder will be required to enter into a formal written contract and, where applicable, a Service Level Agreement with TEDA.

14.3 The service provider will be responsible for the professional conduct and performance of all personnel deployed in terms of the contract.

14.4 TEDA will not be liable for any services rendered outside the approved scope of the contract unless such services have been formally authorised in writing.

14.5 The service provider must comply with all applicable legislation, regulations, professional standards and TEDA policies.

14.6 All intellectual property, reports and programme-related deliverables specifically developed for TEDA under the contract shall be dealt with in accordance with the applicable contractual provisions.

14.7 Confidentiality obligations will survive the termination or expiry of the contract.

14.8 The service provider must comply with all applicable information-security and data-protection requirements and must immediately report any suspected breach involving TEDA or employee information.

14.9 Either party may terminate the contract in accordance with the termination provisions contained in the formal contract.

14.10 The service provider must cooperate with TEDA during contract close-out and provide all information reasonably required to facilitate an orderly transition to a new service provider or alternative service arrangement.

14.11 Nothing contained in this ToR shall be construed as creating an employment relationship between TEDA and any personnel of the appointed service provider.

14.12 TEDA reserves the right to amend, clarify or supplement the ToR through the formal tender clarification and addendum process before the closing date of the tender.

14.13 The final contract shall take precedence in the event of any inconsistency between these Terms of Reference and the signed contractual agreement, subject to the applicable procurement and legal framework.

14.4 Cost of Submission of Proposal

TEDA is not responsible for any costs incurred by the service providers in the process of developing the proposals. The submitted budget for this project must incorporate all expenses to be incurred by the service provider.

14.5 Ownership of Intellectual Property Rights

The ownership of all Intellectual Property Rights associated with this work will be vested within the TEDA, for its exclusive use, or for use by the TEDA, City of Tshwane or relevant stakeholders.

14.6 Criteria for Selection of Service Providers

- a. Where necessary the tender may be evaluated in terms of the Preferential Procurement Policy Framework Act using the 80/20 points system, whereas 80 is price and 20 is BEE for transactions not exceeding R50 million.

- b. A functionality component will be used as a technical evaluation out of 100 weights with a minimum compliance of 75 points.

14.7 Functionality Criteria: Bidders that scores less than 75 points on functionality will not be evaluated further on Price and BEE.

14.8 Compliance

The proposal must either conform to the minimum requirements as set out in this document, or it must be stated clearly how it deviates from these requirements and why. Proposals strictly sticking to specifications are preferred. Offers exceeding the minimum requirements of the specifications are acceptable. Minor deviations may be considered.

This document will be a binding contract between the successful service provider and TEDA once the proposal has been accepted by the organization.

14.9 Payments

Payment shall be made on rendering of a professional satisfactory service and submission of the required report.

Payment shall be made into the service provider's bank account after the receipt of an acceptable invoice. (Banking details MUST be submitted for payment to be affected.)

Based on the Project deliverables, TEDA reserves the right to effect payment according to phases completed satisfactorily.

14.10 Non-Compliance with Delivery Terms

As soon as it becomes known to TEDA that the incumbent will not be able to render services within the expected period and/or against the quoted price and/or as specified, TEDA must be given immediate written notice to this effect. In instances of non-compliance with certain sections of the contract by the service provider, TEDA reserves the right to terminate the agreement.

14.11 Confidentiality

This proposal and all information in connection therewith shall be held in strict confidence by bidders and usage of such information shall be limited to the preparation of the bid. Bidders shall undertake to limit the unauthorised numbers of copies of this document. All bids are bound by confidentiality agreement preventing the unauthorised disclosure of any information regarding TEDA or of its activities to any other organisation or individual. The bidders may not disclose any information, documentation or products to other clients without written approval of TEDA.

14.12 Copyright

Copyrights of all documentation (reports) etc. in relation to this bid belong to TEDA. The successful bidder may not disclose any information, documentation or products to other clients without written approval of TEDA.

14.13 Award of a contract

A contract may, on reasonable and justifiable grounds, be awarded to a bidder that did not score the highest number of points.

Before a bid is adjudicated or at any time, it may be required from a bidder to substantiate claims it has made with regard to preference points claimed.

Points scored will be rounded off to the nearest 2 decimals. In the event that two or more bids have scored equal total points, the contract will be awarded to the bidder scoring the highest number of points for the specified goals.

14.14 Non-commitment

TEDA is not bound to accept any of the bids submitted. TEDA reserves the right to withdraw or amend these terms of reference by notice in writing to all parties who have received the terms of reference prior to the closing date. The cost of preparing of bids will not be reimbursed.

14.15 Fraud and Corruption

All prospective service providers are to take note of the implications of contravening the Prevention and Combating of Corrupt Activities Act, Act No 12 of 2004 and any other Act applicable.

4.16 Review process

Compliance with requirements:

- (i) In order to evaluate and adjudicate bids effectively, it is imperative that bidders submit responsive bids. To ensure that a bid is regarded as responsive it is imperative to comply with all conditions and to state whenever there are deviations.
- (ii) Documents submitted on time by bidders shall not be returned and shall remain the property of TEDA.

4.17 Reasons for Rejection

TEDA reserves the right to return late bid submissions unopened. TEDA reserves the right to disqualify bids that are not according to specification/Terms of Reference. Bidders must clearly indicate compliance or non-compliance with specification/Terms of Reference.

Bidders shall not contact TEDA on any matter pertaining to their bid from the time the bids are closed to the time the bid has been awarded. Any effort by a bidder to influence the bid evaluation, bid comparisons or bid award decisions in any matter, may result in rejection of the bid concerned. TEDA shall reject a submission if the bidder has committed a proven corrupt or fraudulent act in competing for a particular contract.

TEDA may disregard any submission or cancel an existing contract if that bidder, or any of its directors or have:

- (i) Abused the Supply Chain Management (SCM) system of any organ of state.
- (ii) Committed proven fraud or any other improper conduct in relation to such system.
- (iii) Failed to perform on any previous contract and the proof thereof exists.
- (iv) Is restricted from doing business with the public sector if such a supplier obtained preferences fraudulently or if such supplier failed to perform on a contract based on the specific goals.

4.18 Pricing

All prices must be in South African Rand value and must be inclusive of VAT. Fees will be payable in South African Rands, on satisfactory completion of the assignment and or deliverables. Tshwane Economic Development Agency reserves the right to negotiate the cost of deliverables reflected where deemed necessary.

Bidders are required to prepare the responses on the basis of the Price taking into account the scope of work.

Payment and the Price will be according to deliverables completed. Bidders are therefore required to indicate in respect of each deliverable in the scope of work in relation to payment to be made by TEDA.

4.19 Parties not affected by waiver or breaches

The waiver (whether express or implied) by any Party of any breach of the terms or conditions of this contract by the other Party shall not prejudice any remedy of the waiving party in respect of any continuing or other breach of the terms and conditions hereof. No favour, delay, relaxation or indulgence on the part of any Party in exercising any power or right conferred on such Party in terms of this contract shall operate as a waiver of such power or right nor shall any single or partial exercise of any such power or right under this agreement.

4.20 Termination for default

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

- (i) if the bidder fails to deliver any or all of the services within the period(s) specified in the contract, or within any extension thereof granted by TEDA pursuant to GCC Clause 21.2;
- (ii) if the bidder fails to perform any other obligation(s) under the contract;
- (iii) if the bidder, in the judgment of TEDA has engaged in corrupt or fraudulent practices in competing for or in executing the contract.

In the event TEDA terminates the contract in whole or in part, Tshwane Economic Development Agency may procure, upon such terms and in such manner as it deems appropriate, services similar to those undelivered, and the bidder shall be liable to TEDA for any excess costs for such similar services. However, the bidder shall continue performance of the contract to the extent not terminated.

4.21 Retention

On termination of this agreement, the bidder shall, on demand hand over all documentation provided as part of the project and all deliverables, etc., without the right of retention, to TEDA.

No agreement to amend or vary a contract or order or the conditions, stipulations or provisions thereof shall be valid and of any force and effect unless such agreement to amend or vary is entered into in writing and signed by the contracting parties. Any waiver of the requirement that the agreement to amend or vary shall be in writing, shall also be in writing.

4.22 Screening and Vetting

Acceptance of this bid may be subject to the condition that both the contracting bidder and its personnel providing the service must be cleared by the appropriate authorities to the level of **Confidential/Secret/ Top Secret**. All bidders shall be vetted through National Treasury and any defaulters will be disqualified.

4.23 Client Base

Bidders must have specific experience in the delivery of the required service and must submit recent references or client base reflecting the entity where a similar service. TEDA reserves the right to contact references during the evaluation and adjudication process to obtain confirmation.

4.24 Company profile, Central Supplier Database report and BEE certificate

- (i) Bidders must submit company profile.
- (ii) Bidders to submit BEE certification with Commissioner of Oath in a form of an affidavit
- (iii) The service provider must be registered on National Treasury CSD.
- (iv) Bidders must complete MBD 4, 6.1 (PPPFA), 8 and 9 forms

4.25 Registrations

Proof of company registration must be submitted in a form of copies of the relevant registration documents e.g. CC/CK, PTY (Ltd). It is the responsibility of the bidder to ensure that their CIPC annual returns are in order and the registration remains valid throughout the contract tenure.

4.26 Tax Clearance Certificate

A valid Tax Clearance Certificate **with a unique pin** issued by the South African Revenue services(SARS) certifying that the taxes of the bidder are in order must be submitted together with the bid document. It is the responsibility of the bidder to ensure that their SARS annual returns are in order and the registration remains valid throughout the contract.

4.27 Evaluation Basis and Process

Bids will be evaluated on 3 categories:

- (i) Compliance with minimum requirements of the Tender
- (ii) Technical content (functionality), (75 points) Minimum
- (iii) Comparative evaluation based on BEE and Price

4.28 Project Leader

The project leader will be the end-user for the unit that has requested the service.

4.29 Late bids

Bids received late shall not be considered

15. Special conditions of Tender

15.1 Bidders who are in the employ of the state will automatically be disqualified.

15.2 For transactions below R10 million:

Bidders will be disqualified if any municipal rates and taxes or municipal service charges that are owed by the bidder or any of its directors or members to the municipality or a municipal entity or to any other municipality or municipal entity, are in arrears for 90 days. Should the bidder be renting a leased property, both the lessor's and the lessee's agreement must be furnished, together with the landlord's municipal account, or the municipal account must be submitted, together with the bid documents. Municipal account requirements are applicable to subcontracting companies and joint ventures. Should the bidder be renting in a trust, it must submit its shareholding certificate, together with the trust's municipal account.

NB: (Clarification) In order to verify whether bidders are in arrears or not, bidders are required to submit a municipal account or a valid invoice or statement from their landlord. Failure to submit such evidence will result in automatic disqualification.

15.2 For transactions above R10 million:

Bidders will be disqualified if they do not submit a certificate signed by the bidder which certifies that the bidder has no undisputed commitments for municipal services towards a municipality or other service provider in respect of which payment is has been overdue for more than 90 days, unless the bidder has attached to the bid document proof of the payment arrangement for the arrears as at the closing date of the submission of bids.

Should the bidder be renting a leased property, both the lessor's and the lessee's agreement must be furnished, together with the landlord's municipal account, or the municipal account must be submitted, together with the bid documents.

Municipal account requirements are applicable to subcontracting companies and joint ventures.

Should the bidder be renting in a trust, it must submit its shareholding certificate, together with the trust's municipal account.

NB: (Clarification) In order to verify whether bidders are in arrears or not, bidders are required to submit a municipal account, a valid invoice, or a statement from their landlord. Failure to submit such evidence will result in automatic disqualification.

Conditions of Contract are in conflict with General Conditions of Contract, the Special Conditions of the Contract prevail.

15.3 All Bidders must continuously monitor amendments that may be made on TEDA the e Tender and TEDA website for the above bid. TEDA will not be held liable/responsible in the event that Tenderers do not view responses to questions/queries/comments which were posted on the e-Tender portal and TEDA website.

15.4 TEDA may, at its discretion, extend the deadline for the submission of Tenders to give prospective tenderers reasonable time to incorporate the addendum. The same will be indicate on TEDA's website.

15.5 At any time prior to the deadline for submission of Tenders, TEDA may amend the Tender Document by issuing an addendum on TEDA's website. Bidders must always visit the website to ascertain possible amendments.

15.6 TEDA reserves the right to enter into negotiations with the recommended services provider(s)

15.7 NB: Professional registration or statutory body or affiliation: Mandatory requirement.

The service provider Team Members should be registered with relevant health/finance authorities (Health Professions Council of South Africa, South African Social Services Professions Council, South African Nursing Council)

Valid proof of membership for the organization and individuals must be submitted with the bid .

15.8 No service may be rendered without an official order

End of Terms of Reference

MBD 4

(All claims shall be considered as valid until such time that revised claim is submitted to TEDA)

DECLARATION OF INTEREST

1. No bid will be accepted from persons in the service of the state¹.
2. Any person, having a kinship with persons in the service of the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid. In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons connected with or related to persons in service of the state, it is required that the bidder or their authorised representative declare their position in relation to the evaluating/adjudicating authority.
- 3 **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**

3.1 Full Name of bidder or his or her representative:.....

3.2 Identity Number:

3.3 Position occupied in the Company (director, trustee, shareholder²):.....

3.4 Company Registration Number:

3.5 Tax Reference Number:.....

3.6 VAT Registration Number:

3.7 The names of all directors / trustees / shareholders members, their individual identity numbers and state employee numbers must be indicated in paragraph 4 below.

3.8 Are you presently in the service of the state? **YES / NO**

3.8.1 If yes, furnish particulars.

.....

¹MSCM Regulations: "in the service of the state" means to be –

(a) a member of –

- (i) any municipal council;
- (ii) any provincial legislature; or
- (iii) the national Assembly or the national Council of provinces;

(b) a member of the board of directors of any municipal entity;

(c) an official of any municipality or municipal entity;

(d) an employee of any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No.1 of 1999);

(e) a member of the accounting authority of any national or provincial public entity; or

(f) an employee of Parliament or a provincial legislature.

² Shareholder" means a person who owns shares in the company and is actively involved in the management of the company or business and exercises control over the company.

3.9 Have you been in the service of the state for the past twelve months? **YES / NO**

3.9.1 If yes, furnish particulars.....

.....

3.10 Do you have any relationship (family, friend, other) with persons in the service of the state and who may be involved with the evaluation and or adjudication of this bid? **YES / NO**

3.10.1 If yes, furnish particulars.

.....

.....

3.11 Are you, aware of any relationship (family, friend, other) between any other bidder and any persons in the service of the state who may be involved with the evaluation and or adjudication of this bid? **YES / NO**

3.11.1 If yes, furnish particulars

.....

.....

3.12 Are any of the company's directors, trustees, managers, principle shareholders or stakeholders in service of the state? **YES / NO**

3.12.1 If yes, furnish particulars.

.....

.....

3.13 Are any spouse, child or parent of the company's directors trustees, managers, principle shareholders or stakeholders in service of the state? **YES / NO**

3.13.1 If yes, furnish particulars.

.....

.....

3.14 Do you or any of the directors, trustees, managers, principle shareholders, or stakeholders of this company have any interest in any other related companies or business whether or not they are bidding for this contract. **YES / NO**

3.14.1 If yes, furnish particulars:

.....

.....

4. Full details of directors / trustees / members / shareholders.

Full Name	Identity Number	State Employee Number

.....
Signature

.....
Date

.....
Capacity

.....
Name of Bidder

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

(EQUITY OWNERSHIP CLAIMED BY THE SUPPLIER/ SERVICE PROVIDER SHALL REMAIN VALID AND BINDING UNTIL THE
REVISED EQUITY OWNERSHIP CLAIM IS SUBMITTED TO THE TEDA)

PURCHASES

This preference form must form part of all bids invited. It contains general information and serves as a claim form for Historically Disadvantaged Individual (HDI) preference points as well as a summary for preference points claimed for attainment of other specified goals

NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF EQUITY OWNERSHIP BY HISTORICALLY DISADVANTAGED INDIVIDUALS (HDIs), AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022.

1. GENERAL CONDITIONS

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

- the 80/20 system for requirements with a Rand value of up to R50 000 000; and
- the 90/10 system for requirements with a Rand value above R50 000 000.

1.2 The value of this bid is estimated to not exceed R50 000 000 and therefore the 80/20 system shall be applicable.

1.3 Preference points for this bid shall be awarded for:

- (a) Price; and
- (b) Specific contract participation goals, as specified in the attached forms.

1.3.1 The points for this bid are allocated as follows:

	POINTS
1.3.1.1 PRICE	

1.3.1.2 SPECIFIC CONTRACT PARTICIPATION GOALS

(a) Historically Disadvantaged Individuals:

- | | |
|---|-----------|
| (i) who had no franchise in national elections before the 1983 and 1993 Constitutions | ...8.... |
| (ii) who is a female | ...4..... |
| (iii) who has a disability | ...4..... |
| (iii) who is a youth (below 35 years of age) | ...4..... |

(b) Other specific goals (goals of the RDP- plus local manufacture)

- | | |
|-----------|-------|
| (i) N/A | |
| (ii) N/A | |
| (iii) N/A | |

**Total points for Price, HDIs and other RDP-
goals must not exceed**

100

PLEASE ATTACH BEE CERTIFICATE

Separate Preference Points Claim Forms will be used for the promotion of the specific goals for which points have been allocated in paragraph 1.3.1.2 (b) above.

- 1.4 Failure on the part of a bidder to fill in and/or to sign this form may be interpreted to mean that preference points are not claimed.
- 1.5. The purchaser 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 purchaser.

2. GENERAL DEFINITIONS

- 2.1 **“Acceptable bid”** means any bid which, in all respects, complies with the specifications and conditions of bid as set out in the bid document.
- 2.2 **“Bid”** means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of goods, works or services.
- 2.3 **“Comparative price”** means the price after the factors of a non-firm price and all unconditional discounts that can be utilised have been taken into consideration.
- 2.4 **“Consortium or joint venture”** means an association of persons for the purpose of combining their expertise, property, capital, efforts, skills and knowledge in an activity for the execution of a contract.
- 2.5 **“Contract”** means the agreement that results from the acceptance of a bid by an organ of state.
- 2.6 **“Specific contract participation goals”** means the goals as stipulated in the Preferential Procurement Regulations 2001.
- 2.6.1 In addition to above-mentioned goals, the Regulations [12.(1)] also make provision for organs of state to give particular consideration to procuring locally manufactured products.
- 2.7 **“Control”** means the possession and exercise of legal authority and power to manage the assets, goodwill and daily operations of a business and the active and continuous exercise of appropriate managerial authority and power in determining the policies and directing the operations of the business.
- 2.8 **“Disability”** means, in respect of a person, a permanent impairment of a physical, intellectual, or sensory function, which results in restricted, or lack of, ability to perform an activity in the manner, or within the range, considered normal for a human being.
- 2.9 **“Equity Ownership”** means the percentage ownership and control, exercised by individuals within an enterprise.
- 2.10 **“Historically Disadvantaged Individual (HDI)”** means a South African citizen
- (1) who, due to the apartheid policy that had been in place, had no franchise in national elections prior to the introduction of the Constitution of the Republic of South Africa, 1983 (Act No 110 of 1983) or the Constitution of the Republic of South Africa, 1993, (Act No 200 of 1993) (“the interim Constitution); and/or
 - (2) who is a female; and/or
 - (3) who has a disability:
- provided that a person who obtained South African citizenship on or after the coming to effect of the Interim Constitution, is deemed not to be a HDI;
- 2.11 **“Management”** means an activity inclusive of control and performed on a daily basis, by any person who is a principal executive officer of the company, by whatever name that person may be designated, and whether or not that person is a director.
- 2.12 **“Owned”** means having all the customary elements of ownership, including the right of decision-making and sharing all the risks and profits commensurate with the degree of ownership interests as

demonstrated by an examination of the substance, rather than the form of ownership arrangements.

- 2.13 **“Person”** includes reference to a juristic person.
- 2.14 **“Rand value”** means the total estimated value of a contract in Rand denomination that is calculated at the time of bid invitations and includes all applicable taxes and excise duties.
- 2.15 **“Small, Medium and Micro Enterprises (SMMEs)”** bears the same meaning assigned to this expression in the National Small Business Act, 1996 (No 102 of 1996).
- 2.16 **“Sub-contracting”** means the primary contractor’s assigning or leasing or 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.
- 2.17 **“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.
- 2.18 **“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.

3. ESTABLISHMENT OF HDI EQUITY OWNERSHIP IN AN ENTERPRISE

- 3.1 Equity ownership shall be equated to the percentage of an enterprise which is owned by individuals classified as HDIs, or in the case of a company, the percentage shares that are owned by individuals classified as HDIs, who are actively involved in the management and daily business operations of the enterprise and exercise control over the enterprise, commensurate with their degree of ownership.
- 3.2 Where individuals are not actively involved in the management and daily business operations and do not exercise control over the enterprise commensurate with their degree of ownership, equity ownership may not be claimed.

4. ADJUDICATION USING A POINT SYSTEM

- 4.1 The bidder obtaining the highest number of points will be awarded the contract.
- 4.2 Preference points shall be calculated after prices have been brought to a comparative basis.
- 4.3 Points scored will be rounded off to 2 decimal places.
- 4.4 In the event of equal points scored, the bid will be awarded to the bidder scoring the highest number of points for specified goals.

5. POINTS AWARDED FOR PRICE

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

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

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

Where

P_s = Points scored for price of bid under consideration

Pt = Rand value of bid under consideration

Pmin = Rand value of lowest acceptable bid

6. Points awarded for historically disadvantaged individuals

- 6.1 In terms of Regulation 13 (2) preference points for HDI's are calculated on their percentage shareholding in a business, provided that they are actively involved in and exercise control over the enterprise. The following formula is prescribed in Regulation 13 (5) (c):

$$NEP = NOP \times \frac{EP}{100}$$

Where

NEP = Points awarded for equity ownership by an HDI

NOP = The maximum number of points awarded for equity ownership by an HDI in that specific category

EP = The percentage of equity ownership by an HDI within the enterprise or business, determined in accordance with the definition of HDI's.

- 6.2 Equity claims for a trust will only be allowed in respect of those persons who are both trustees and beneficiaries and who are actively involved in the management of the trust.
- 6.3 Documentation to substantiate the validity of the credentials of the trustees contemplated above must be submitted.
- 6.4 Listed companies and tertiary institutions do not qualify for HDI preference points.
- 6.5 A consortium or joint venture may, based on the percentage of the contract value managed or executed by their HDI-members, be entitled to preference points in respect of an HDI.
- 6.6 A person awarded a contract as a result of preference for contracting with, or providing equity ownership to an HDI, may not subcontract more than 25% of the value of the contract to a person who is not an HDI or does not qualify for the same number or more preference for equity ownership.

7. BID DECLARATION

- 7.1 Bidders who claim points in respect of equity ownership must complete the Bid Declaration at the end of this form.

8. EQUITY OWNERSHIP CLAIMED IN TERMS OF PARAGRAPH 2.10 ABOVE. POINTS TO BE CALCULATED FROM INFORMATION FURNISHED IN PARAGRAPH 9.8.

	Ownership	Percentage owned	Points claimed
8.1	Equity ownership by persons who had no franchise in the national elections	8%	 (Submit BEE Certificate)
8.2	Equity ownership by women	4%	 (Submit ID document)
8.3	Equity ownership by disabled persons*	4%	 (Submit Disability Certificate)
8.4	Equity ownership by Youth	4%	 (Submit ID document)

*If points are claimed for disabled persons, indicate nature of impairment (see paragraph 2.8 above)

9. SUB-CONTRACTING

9.1 Will any portion of the contract be sub-contracted?

(Tick applicable box)

YES		NO	
-----	--	----	--

a) 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 subcontractor.....

iv) Whether the sub-contractor is an EME or QSE

(Tick applicable box)

YES		NO	
-----	--	----	--

v) Specify, by ticking the appropriate box, if subcontracting with an enterprise in terms of Preferential Procurement Regulations, 2017:

10. DECLARATION WITH REGARD TO EQUITY

10.1 Name of firm :

10.2 VAT registration number :

10.3 Company registration number :

10.4 TYPE OF FIRM

- ☐ Partnership
- ☐ One person business/sole trader
- ☐ Close corporation
- ☐ Company
- ☐ (Pty) Limited

[TICK APPLICABLE BOX]

10.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

.....

.....

.....

10.6 COMPANY CLASSIFICATION

- ☐ Manufacturer
 - ☐ Supplier
 - ☐ Professional service provider
 - ☐ Other service providers, e.g. transporter, etc.
- [TICK APPLICABLE BOX]

10.7 TOTAL NUMBER OF YEARS THE FIRM HAS BEEN IN BUSINESS?

10.8 List all Shareholders by Name, Position, Identity Number, Citizenship, HDI status and ownership, as relevant. Information to be used to calculate the points claimed in paragraph 8.

Name	Date/Position occupied in Enterprise	ID Number	Date RSA Citizenship obtained	* HDI Status				% of business / enterprise owned
				No franchise prior to elections	Women	Disabled	Youth	

*Indicate YES or NO

10.9 Consortium / Joint Venture

10.9.1 In the event that preference points are claimed for HDI members by consortia / joint ventures, the following information must be furnished in order to be entitled to the points claimed in respect of the HDI member:

Name of HDI member (to be consistent with paragraph 9.8)	Percentage (%) of the contract value managed or executed by the HDI member

10.10 I/we, the undersigned, who warrants that he/she is duly authorised to do so on behalf of the firm certify that points claimed, based on the equity ownership, indicated in paragraph 8 of the foregoing certificate, qualifies the firm for the preference(s) shown and I / we acknowledge that:

- (i) The information furnished is true and correct.
- (ii) The Equity ownership claimed is in accordance with the General Conditions as indicated in paragraph 1 of this form.

- (iii) In the event of a contract being awarded as a result of points claimed as shown in paragraph 8, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct.
- (iv) If the claims are found to be incorrect, the purchaser may, in addition to any other remedy it may have -
- (a) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 - (b) 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;
 - (c) impose a financial penalty more severe than the theoretical financial preference associated with the claim which was made in the bid; and

WITNESSES:

1.

.....
SIGNATURE(S) OF BIDDER(S)

2.

DATE.....

ADDRESS.....

.....

DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

(All claims shall be considered as valid until such time that revised claim is submitted to TEDA)

- 1 This Municipal Bidding Document must form part of all bids invited.
- 2 It serves as a declaration to be used by municipalities and municipal entities in ensuring that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system.
- 3 The bid of any bidder may be rejected if that bidder, or any of its directors have:
 - a. abused the municipality's / municipal entity's supply chain management system or committed any improper conduct in relation to such system;
 - b. been convicted for fraud or corruption during the past five years;
 - c. willfully neglected, reneged on or failed to comply with any government, municipal or other public sector contract during the past five years; or
 - d. been listed in the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004).
- 4 **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**

Item	Question	Yes	No
4.1	Is the bidder or any of its directors listed on the National Treasury's Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector? (Companies or persons who are listed on this Database were informed in writing of this restriction by the Accounting Officer/Authority of the institution that imposed the restriction after the <i>audi alteram partem</i> rule was applied). The Database of Restricted Suppliers now resides on the National Treasury's website(www.treasury.gov.za) and can be accessed by clicking on its link at the bottom of the home page.	Yes ☐	No ☐
4.1.1	If so, furnish particulars:		
4.2	Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)? The Register for Tender Defaulters can be accessed on the National Treasury's website (www.treasury.gov.za) by clicking on its link at the bottom of the home page.	Yes ☐	No ☐
4.2.1	If so, furnish particulars:		
4.3	Was the bidder or any of its directors convicted by a court of law (including a court of law outside the Republic of South Africa) for fraud or corruption during the past five years?	Yes ☐	No ☐

4.3.1	If so, furnish particulars:		
Item	Question	Yes	No
4.4	Does the bidder or any of its directors owe any municipal rates and taxes or municipal charges to the municipality / municipal entity, or to any other municipality / municipal entity, that is in arrears for more than three months?	Yes ☐	No ☐
4.4.1	If so, furnish particulars:		
4.5	Was any contract between the bidder and the municipality / municipal entity or any other organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	Yes ☐	No ☐
4.7.1	If so, furnish particulars:		

CERTIFICATION

**I, THE UNDERSIGNED (FULL NAME)
 CERTIFY THAT THE INFORMATION FURNISHED ON THIS
 DECLARATION FORM TRUE AND CORRECT.**

**I ACCEPT THAT, IN ADDITION TO CANCELLATION OF A CONTRACT,
 ACTION MAY BE TAKEN AGAINST ME SHOULD THIS DECLARATION
 PROVE TO BE FALSE.**

.....
Signature

.....
Date

.....
Position

.....
Name of Bidder

CERTIFICATE OF INDEPENDENT BID DETERMINATION

(All claims shall be considered as valid until such time that revised claim is submitted to TEDA)

- 1 This Municipal Bidding Document (MBD) must form part of all bids¹ invited.

- 2 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).² Collusive bidding is a *pe se* prohibition meaning that it cannot be justified under any grounds.

- 3 Municipal Supply Regulation 38 (1) prescribes that a supply chain management policy must provide measures for the combating of abuse of the supply chain management system, and must enable the accounting officer, among others, to:
 - a. take all reasonable steps to prevent such abuse;
 - b. reject the bid of any bidder if that bidder or any of its directors has abused the supply chain management system of the municipality or municipal entity or has committed any improper conduct in relation to such system; and
 - c. cancel a contract awarded to a person if the person committed any corrupt or fraudulent act during the bidding process or the execution of the contract.

- 4 This MBD serves as a certificate of declaration that would be used by institutions to ensure that, when bids are considered, reasonable steps are taken to prevent any form of bid-rigging.

- 5 In order to give effect to the above, the attached Certificate of Bid Determination (MBD 9) must be completed and submitted with the bid:

¹ Includes price quotations, advertised competitive bids, limited bids and proposals.

² 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 not to compete.

CERTIFICATE OF INDEPENDENT BID DETERMINATION

I, the undersigned, in submitting the accompanying bid:

(Bid Number and Description)

in response to the invitation for the bid made by:

(Name of Municipality / Municipal Entity)

do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of: _____ that:

(Name of Bidder)

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign, the bid, on behalf of the bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:
 - (a) has been requested to submit a bid in response to this bid invitation;
 - (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
 - (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder

6. The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However communication between partners in a joint venture or consortium³ will not be construed as collusive bidding.
7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
 - (a) prices;
 - (b) geographical area where product or service will be rendered (market allocation)
 - (c) methods, factors or formulas used to calculate prices;
 - (d) the intention or decision to submit or not to submit, a bid;
 - (e) the submission of a bid which does not meet the specifications and conditions of the bid; or
 - (f) bidding with the intention not to win the bid.
8. In addition, there have been 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 which this bid invitation relates.
9. The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

³ Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

10. I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

.....
Signature

.....
Date

.....
Position

.....
Name of Bidder

Annexure A

GOVERNMENT PROCUREMENT GENERAL CONDITIONS OF CONTRACT

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 any thing of value to influence the action of a public official in the procurement process or in contract execution.
 - 1.5 "Countervailing duties" are imposed in cases where an enterprise abroad is subsidized by its government and encouraged to market its products internationally.
 - 1.6 “Country of origin” means the place where the goods were mined, grown or produced or from which the services are supplied. Goods are produced when, through manufacturing, processing or substantial and major assembly of components, a commercially recognized new product results that is substantially different in basic characteristics or in purpose or utility from its components.
 - 1.7 “Day” means calendar day.
 - 1.8 “Delivery” means delivery in compliance of the conditions of the contract or order.
 - 1.9 “Delivery ex stock” means immediate delivery directly from stock actually on hand.
 - 1.10 “Delivery into consignees store or to his site” means delivered and unloaded in the specified store or depot or on the specified site in compliance with the conditions of the contract or order, the supplier bearing all risks and charges involved until the supplies are so delivered and a valid receipt is obtained.
 - 1.11 "Dumping" occurs when a private enterprise abroad market its goods on own initiative in the RSA at lower prices than that of the country of origin and which have the potential to harm the local industries in the RSA.
 - 1.12 "Force majeure" means an event beyond the control of the supplier and not involving the supplier's fault or negligence and not foreseeable.

Such events may include, but is not restricted to, acts of the purchaser in its sovereign capacity, wars or revolutions, fires, floods, epidemics, quarantine restrictions and freight embargoes.

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

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| 2. Application | <p>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.</p> <p>2.2 Where applicable, special conditions of contract are also laid down to cover specific supplies, services or works.</p> <p>2.3 Where such special conditions of contract are in conflict with these general conditions, the special conditions shall apply.</p> |
| 3. General | <p>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.</p> <p>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</p> |
| 4. Standards | <p>4.1 The goods supplied shall conform to the standards mentioned in the bidding documents and specifications.</p> |
| 5. Use of contract documents and information; inspection. | <p>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.</p> <p>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.</p> <p>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.</p> <p>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.</p> |
| 6. Patent rights | <p>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.</p> |
| 7. Performance security | <p>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.</p> |

- 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.

**8. Inspections,
tests and
analyses**

- 8.1 All pre-bidding testing will be for the account of the bidder.
- 8.2 If it is a bid condition that supplies to be produced or services to be rendered should at any stage during production or execution or on completion be subject to inspection, the premises of the bidder or contractor shall be open, at all reasonable hours, for inspection by a representative of the Department or an organization acting on behalf of the Department.
- 8.3 If there are no inspection requirements indicated in the bidding documents and no mention is made in the contract, but during the contract period it is decided that inspections shall be carried out, the purchaser shall itself make the necessary arrangements, including payment arrangements with the testing authority concerned.
- 8.4 If the inspections, tests and analyses referred to in clauses 8.2 and 8.3 show the supplies to be in accordance with the contract requirements, the cost of the inspections, tests and analyses shall be defrayed by the purchaser.
- 8.5 Where the supplies or services referred to in clauses 8.2 and 8.3 do not comply with the contract requirements, irrespective of whether such supplies or services are accepted or not, the cost in connection with these inspections, tests or analyses shall be defrayed by the supplier.
- 8.6 Supplies and services which are referred to in clauses 8.2 and 8.3 and which do not comply with the contract requirements may be rejected.
- 8.7 Any contract supplies may on or after delivery be inspected, tested or analyzed and may be rejected if found not to comply with the requirements of the contract. Such rejected supplies shall be held at the cost and risk of the supplier who shall, when called upon, remove them immediately at his own cost and forthwith substitute them with

supplies which do comply with the requirements of the contract. Failing such removal the rejected supplies shall be returned at the suppliers cost and risk. Should the supplier fail to provide the substitute supplies forthwith, the purchaser may, without giving the supplier further opportunity to substitute the rejected supplies, purchase such supplies as may be necessary at the expense of the supplier.

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

9. Packing

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

10. Delivery and documents

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

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

14. Spare parts

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

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

15. Warranty

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

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

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

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

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

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|---|--|
| 16. Payment | <p>16.1 The method and conditions of payment to be made to the supplier under this contract shall be specified in SCC.</p> <p>16.2 The supplier shall furnish the purchaser with an invoice accompanied by a copy of the delivery note and upon fulfillment of other obligations stipulated in the contract.</p> <p>16.3 Payments shall be made promptly by the purchaser, but in no case later than thirty (30) days after submission of an invoice or claim by the supplier.</p> <p>16.4 Payment will be made in Rand unless otherwise stipulated in SCC.</p> |
| 17. Prices | <p>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.</p> |
| 18. Contract amendments | <p>18.1 No variation in or modification of the terms of the contract shall be made except by written amendment signed by the parties concerned.</p> |
| 19. Assignment | <p>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.</p> |
| 20. Subcontracts | <p>20.1 The supplier shall notify the purchaser in writing of all subcontracts awarded under this contracts if not already specified in the bid. Such notification, in the original bid or later, shall not relieve the supplier from any liability or obligation under the contract.</p> |
| 21. Delays in the supplier's performance | <p>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.</p> <p>21.2 If at any time during performance of the contract, the supplier or its subcontractor(s) should encounter conditions impeding timely delivery of the goods and performance of services, the supplier shall promptly notify the purchaser in writing of the fact of the delay, its likely duration and its cause(s). As soon as practicable after receipt of the supplier's notice, the purchaser shall evaluate the situation and may at his discretion extend the supplier's time for performance, with or without the imposition of penalties, in which case the extension shall be ratified by the parties by amendment of contract.</p> <p>21.3 No provision in a contract shall be deemed to prohibit the obtaining of supplies or services from a national department, provincial department, or a local authority.</p> <p>21.4 The right is reserved to procure outside of the contract small quantities or to have minor essential services executed if an emergency arises, the supplier's point of supply is not situated at or near the place where the supplies are required, or the supplier's services are not readily available.</p> |

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

21.6 Upon any delay beyond the delivery period in the case of a supplies contract, the purchaser shall, without canceling 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.

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.

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.

**27. Settlement of
Disputes**

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

**28. Limitation of
liability**

- 28.1 Except in cases of criminal negligence or willful misconduct, and in the case of infringement pursuant to Clause 6;
- (a) the supplier shall not be liable to the purchaser, whether in contract, tort, or otherwise, for any indirect or consequential loss or damage, loss of use, loss of production, or loss of profits or interest costs, provided that this exclusion shall not apply to any obligation of the supplier to pay penalties and/or damages to the purchaser; and

		(b) the aggregate liability of the supplier to the purchaser, whether under the contract, in tort or otherwise, shall not exceed the total contract price, provided that this limitation shall not apply to the cost of repairing or replacing defective equipment.
29. Governing language	29.1	The contract shall be written in English. All correspondence and other documents pertaining to the contract that is exchanged by the parties shall also be written in English.
30. Applicable law	30.1	The contract shall be interpreted in accordance with South African laws, unless otherwise specified in SCC.
31. Notices	31.1	Every written acceptance of a bid shall be posted to the supplier concerned by registered or certified mail and any other notice to him shall be posted by ordinary mail to the address furnished in his bid or to the address notified later by him in writing and such posting shall be deemed to be proper service of such notice
	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 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.