

REQUEST FOR BID PROFESSIONAL SERVICES



BID DETAILS

BID NUMBER: NERSA/2425/HRD/EHWP/BID003

CLOSING Date: 21 JUNE 2024

Time: 11:00

DESCRIPTION: THE APPOINTMENT OF A SERVICE PROVIDER TO RENDER THE EMPLOYEE HEALTH AND WELLNESS PROGRAM (EHWP) SERVICES FOR THE NATIONAL ENERGY REGULATOR OF SOUTH AFRICA FOR A PERIOD OF THREE (3) YEARS.

**NON-COMPULSORY
VIRTUAL BRIEFING
SESSION:**

Yes

☒

No

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See Section A Part 1: Bid Submission Conditions and Instructions.

DETAILS OF BIDDER

Organisation/individual:

Contact person:

Date:

Email address:

Telephone Number:

Cellular Number:

Fax Number:

Please indicate whether it is the original or copy, tick the applicable block.

ORIGINAL

☐

COPY

☐

Please do not retype the bid document.

SECTION A

GLOSSARY

AWARD	Conclusion of the procurement process and final notification to the effect to the successful bidder
B-BBEE	Broad-based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003) and the Codes of Good Practice issued there under by the Department of Trade and Industry
BID	Written offer in a prescribed or stipulated form in response to an invitation by NERSA for the provision of services, works or goods
CONTRACTOR	Contracting entity with whom NERSA will conclude a formal contract and potential service level agreement subsequent to the final award of the contract based on this Request for Bid
DTI	Department of Trade and Industry
GCC	General Conditions of Contract
IP	Intellectual Property
NIPP	National Industrial Participation Programme
ORIGINAL BID	Original document signed in ink Copies of original document signed in ink Facsimile of original document signed in ink
SCM	Supply Chain Management
SLA	Service Level Agreement

SECTION A

DOCUMENTS IN THIS BID DOCUMENT PACK

Bidders are to ensure that they have received all pages (pp. 56) of this document, which consist of the following sections:

SECTION A

Note: Documents in this section must be returned with bids.

- ☐ Bid Submission Conditions and Instructions
- ☐ Evaluation Process / Selection Criteria
- ☐ Terms of Reference
- ☐ Contract Form (Rendering of Services Parts 1 & 2) - The pro forma contract is only included for bidders to take note of the contents of the contract that will be entered into with the successful contractor)

SECTION B

Note: Documents in this section must be fully completed, signed and returned or supplied with bids.

- ☐ Special Conditions of Bid and Contract – Special conditions that the bidder needs to accept
- ☐ SARS Tax Compliance Status Pin Letter or Printed Tax Clearance Certificate
- ☐ Bidder's Disclosure
- ☐ Preference Points Claim Form in terms of the Preferential Procurement Regulations 2001 (Purchases)
- ☐ B-BBEE Certificate, Sworn Affidavit for Exempted Micro Enterprises (EME)
- ☐ Invitation to Bid
- ☐ Technical Proposal
- ☐ Experience in this field
- ☐ Team Details (CV's)
- ☐ Pricing Schedule/Financial Proposal (Services: Professional)
- ☐ Labour Legislative Requirements (CIPC)
- ☐ Membership of professional bodies (Institutes, Affiliates, Accreditations or Associates)
- ☐ National Treasury CSD registration summary report
- ☐ Reference letters

SECTION A

SECTION A

BID SUBMISSION CONDITIONS AND INSTRUCTIONS

CONDITIONS AND INSTRUCTIONS THAT BIDDERS NEED TO TAKE NOTE OF

1 FRAUD AND CORRUPTION

All 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.

2 NON-COMPULSORY VIRTUAL BRIEFING SESSION

2.1.1 The non-compulsory virtual briefing session will be held on **10 June 2024 at 10:00**, MS TEAMS.

2.1.2 Bidders who are interested in attending the session are required to send an email request to be registered at briefingsessions@nersa.org.za by 09:00 on **10 June 2024**.

2.1.3 Any clarification required by a bidder regarding the meaning or interpretation of the Terms of Reference, or any other aspect concerning the bid, is preferably to be requested prior to the meeting by email to briefingsessions@nersa.org.za. Bidders are advised to study this document before attending the meeting.

2.1.4 It is the responsibility of bidders to take their own notes during the virtual briefing session. However, all those attending will be issued with summarised minutes of the session before the closing date of bid, forwarded electronically upon request.

2.1.5 Bidders who arrive after the compulsory briefing session has ended will not be allowed to submit their bids.

3 CLARIFICATIONS/ QUERIES

3.1.1 Any clarification required by a bidder regarding the meaning or interpretation of the Terms of Reference, or any other aspect concerning the bid, is to be requested **from the date of publication** in writing by e-mail from briefingsessions@nersa.org.za not later than 12:00 on the **11 June 2024**. No clarification will be attended to after this closing time. Therefore, bidders are encouraged to send questions before the briefing session date to be attended prior to the meeting.

3.1.2 A reply will be forwarded on **12 June 2024**. The bid reference number should be mentioned in all correspondence. Telephonic requests for clarification will not be accepted. If appropriate, the clarifying information will be made available to all bidders by e-mail only.

4 SUBMITTING BIDS

4.1.1 One (1) original of the bid document plus one (1) **memory stick (USB)** that contains the duplicate of the original submission to be handed in / delivered to: The Procurement Manager, NERSA, Kulawula House, 526 Madiba Street, Arcadia, Pretoria.

SECTION A Part 1: Bid Submission Conditions and Instructions

- 4.1.2 The original version of the bid must be submitted with one (1) memory stick. The original bid document must be fully completed and/or signed in ink and thereafter duplicate the original in the memory stick with all its attachments. In addition, Bidders must submit a memory stick sealed in a closed envelope for submission.
- 4.1.3 An original bid document may not be converted into word format or retyped, however, may be completed/filled in ink.
- 4.1.4 **Bidders will be required to sign a tender register at the reception when dropping of the bids.**
- 4.1.5 **The financial proposal should be submitted separately in a sealed envelope.**

Bids should be submitted in a sealed envelope, marked with:

- Bid number **NERSA/2425/HRD/EHWP/BID003**
- Closing date and time **(21 JUNE 2024 at 11:00)**
- The name and address of the bidder.
- Bids received in an envelope that is not sealed may be disqualified.

Documents submitted on time by bidders shall not be returned.

5 LATE BIDS

- 5.1.1 Bids received late shall not be considered. A bid will be considered late if it arrived even one second after 11:00 or any time thereafter. The tender (bid) box shall be locked at exactly 11:00 and bids arriving late will not be considered under any circumstances. Bids received late shall be returned unopened to the bidder. Bidders are therefore strongly advised to ensure that bids be despatched allowing enough time for any unforeseen events that may delay the delivery of the bid.

The official Telkom time (Dial 1026) will be used to verify the exact closing time.

- 5.1.2 Bids sent to NERSA via normal post or any other mechanism shall be deemed to be received at the date and time of arrival at the NERSA premises (in tender box in reception area or if too big for the tender box, over the counter in the reception area). Bids received at the physical address after the closing date and time of the bid, shall therefore be deemed to be received late.

6 DIRECTIONS TO NERSA OFFICES FOR DELIVERY OF BIDS

- 6.1.1 Physical Address is as follows:

NERSA, Kulawula House
526 Madiba Street
Arcadia
Pretoria.

Bidders should allow time to access the premises due to security arrangements that need to be observed. In addition, bidders will be required to sign a tender register at the reception when dropping of the bids.

DIRECTIONS TO NERSA

From OR Tambo International Airport

Take the R21 (North) to Pretoria
Continue on the R21 for approximately 45 kilometers
At the roundabout (Fountains Circle) follow the Sunnyside signs (M5)
Continue driving on Mears Street (becomes Steve Biko Street)
Turn right onto Madiba St
Kulawula House (NERSA) will be on your left
NB: Parking available opposite NERSA at Sancardia Centre

From Johannesburg

Follow N1/M1 north
Continue on the N1/M1 north
This road then becomes M1
Continue on the M1 and take the Eeufees off ramp
At the bottom of the Eeufees T-junction turn right
Turn left under the bridge
Follow the Sunnyside signs (M5)
Continue driving on Mears Street (becomes Steve Biko Street)
Turn right onto Madiba St
Kulawula House (NERSA) will be on your left
NB: Parking available opposite NERSA at Sancardia Centre

GPS coordinates

Dec:	Latitude -25.743579	DMS: Lat 25°44'37.6"S
	Longitude 28.204839	Long 28°12'17.3"E

7 NEGOTIATION AND CONTRACTING

- 7.2 NERSA has the right to enter into negotiation with one or more bidders regarding any terms and conditions, including price(s), of a proposed contract.
- 7.3 NERSA shall not be obliged to accept the lowest of any quotation, offer or proposal.
- 7.4 A contract will only be deemed to be concluded when reduced to writing in a formal contract and Service Level Agreement signed by the designated responsible person of both parties. The designated responsible person of NERSA is the Chief Executive Officer (CEO) or his/her written authorised delegate.
- 7.5 Under no circumstances will negotiation with any bidders constitute an award or promise / undertaking to award the contract.

8 ACCESS TO INFORMATION

All bidders will be informed of the status of their bid once the procurement process has been completed. Requests for information regarding the bid process will be dealt with in line with the NERSA procurement policy and relevant legislation.

9 REASONS FOR REJECTION

- 9.1 NERSA shall reject a proposal for the award of a contract if the recommended bidder has committed a proven corrupt or fraudulent act in competing for the particular contract.
- 9.2 NERSA may disregard the bid of any bidder if that bidder, or any of its directors:
- 9.3 Have abused the SCM system of NERSA.
- 9.4 Have committed proven fraud or any other improper conduct in relation to such system.
- 9.5 Have failed to perform on any previous contract and the proof exists.
- 9.6 Such actions shall be communicated to the National Treasury.

10 PAYMENTS

- 10.1 NERSA will pay the contractor the fees set out in the final contract according to the table of deliverables. No additional amounts will be payable by NERSA to the contractor.
- 10.2 The contractor shall from time to time during the currency of the contract, invoice NERSA for the services rendered.
- 10.3 The invoice must be accompanied by supporting source document(s) containing detailed information, as NERSA may reasonably require, for the purposes of establishing the specific nature, extent and quality of the services which were undertaken by the contractor.
- 10.4 No payment will be made to the contractor unless an original tax invoice complying with section 20 of the VAT Act No 89 of 1991, as amended, has been submitted to NERSA.
- 10.5 Payment shall be made by bank transfer into the Contractor's bank account normally 30 days after receipt of an acceptable, original, valid tax invoice. Money will only be transferred into a South African bank account. (Banking details must be submitted as soon as the bid is awarded).
- 10.6 The Contractor shall be responsible for accounting to the appropriate authorities for its income tax, VAT or other moneys required to be paid in terms of the applicable law.
- 10.7 Method of Payment in respect of services delivered by the Contractor will be made monthly, subject to the submission of detailed invoices, and verification by NERSA staff or person designated. Invoices must be forwarded to invoice@nersa.org.za.

11 CANCELLATION OF PROCUREMENT PROCESS

This procurement process can be postponed or cancelled at any stage provided that such cancellation or postponement takes place prior to entering into a contract with a specific service provider to which the bid relates.

BIDDERS MUST TAKE NOTE OF THE EVALUATION PROCESS THAT WILL BE FOLLOWED**1 EVALUATION PROCESS****1.1 COMPLIANCE WITH MINIMUM REQUIREMENTS CRITERIA**

All bids duly lodged as specified in this Request for Bid will be examined to determine compliance with bidding requirements and conditions. Bids with deviations from the requirements / conditions, will be eliminated from further consideration.

1.2 SELECTION CRITERIA, PRICE AND PREFERENCE POINTS

- 1.2.1 All remaining bids as per paragraph 1.1 will be evaluated as follows:
- 1.2.2 Bids will be evaluated first on selection criteria and then in accordance with the 80/20 reference points system prescribed in Preferential Procurement Regulations.
- 1.2.3 The First stage, bids will be evaluated on selection criteria, of which (100 points) shall be awarded on selection criteria evaluation.
- 1.2.4 Bids will be considered further if it achieves the minimum prescribed qualifying score for selection criteria (60.00 points out of 100). Bids that failed to achieve the minimum qualifying score on selection criteria will be disqualified for further evaluation.
- 1.2.5 The Second stage, bids will be evaluated in terms of the 80/20 preference point systems. Only bids that achieve the minimum qualifying score/percentage on selection criteria will be evaluated in accordance with the 80/20 preference point system.

1.3 DETERMINATION OF PERCENTAGE FOR SELECTION CRITERIA

- 1.3.1 The evaluation criteria and weights on selection criteria as indicated in the table in paragraph 2, will apply.
- 1.3.2 The percentage scored on selection criteria should be calculated as follows:
- 1.3.3 Each panel member shall award values for each individual criterion on a score sheet. The value scored for each criterion shall be multiplied with the specified weighting for the relevant criterion to obtain the marks scored for the various criteria. These marks should be added to obtain the total score. The following formula should then be used to convert the total score to a percentage on selection criteria:

$$Ps = \frac{So}{Ms} \times Ap$$

Where

Ps = percentage scored on selection criteria /proposal under consideration

So = total score of bid/proposal under consideration

Ms = maximum possible score

Ap = percentage allocated on selection criteria

SECTION A Part 2: Evaluation Process/Criteria

- 1.3.4 The percentages of each panel member shall be added together and divided by the number of panel members to establish the average percentage obtained by each individual bidder on selection criteria evaluation.

1.4 ELIMINATION OF PROPOSALS ON GROUNDS OF FUNCTIONALITY

- 1.4.1 Bids that score less than **60%** of the marks available on selection criteria evaluation will be eliminated from further consideration.
- 1.4.2 If appropriate, implied contract price adjustments will be made to the cost proposals of all remaining bids.
- 1.4.3 The percentage scored for price shall be calculated as follows:

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

80/20

$$P_s = 80 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

Where

- P_s = Points scored for comparative price of bid under consideration
 P_t = Comparative price of bid under consideration
 P_{\min} = Comparative price of lowest acceptable bid

1.5 AWARDING OF POINTS FOR SPECIFIC GOALS

- 1.5.1 Points to be awarded to a bidder based on his or her specific goals see below table:

PRICE	MAXIMUM POINTS	REQUIRED EVIDENCE
Price	80	
Specific Goal	20	
▪ Black Owned	10	Valid BBB-EE certificate or sworn affidavit
▪ Woman Owned	10	Valid BBB-EE certificate or sworn affidavit
Total Points	100	

Bidders who wish to claim points for specific must ensure that documentary evidence to support the claim is attached to the bid document as specified in table above

1.6 COMBINING PRICE AND SPECIFIC GOALS

- 1.6.1 The points for specific goals will now be added to the price.
- 1.6.2 Only the bid with the highest number of points scored may be selected for award.

SECTION A Part 2: Evaluation Process/Criteria

- 1.6.3 The Bid Adjudication Committee will consider the recommendations and make the final award. The successful bidder will usually be the bidder scoring the highest number of points or it may be a lower scoring bid on justifiable grounds or no award at all.

1.7 PRESENTATIONS (optional)

- 1.7.1 NERSA reserves the right to invite bidders for presentations before the award of the bid.
- 1.7.2 NERSA may decide to have compulsory presentations made either by all bidders who have obtained at least **60%** of the marks on selection criteria evaluation, or by the bidders ranked first, to third once the selection criteria, price and preference marks have been combined.
- 1.7.3 Presentations shall only affect the marks awarded on selection criteria evaluation. If NERSA wishes to use presentations to discriminate between bidders, the evaluation criteria to be affected shall be determined in advance and due allowance made in the mark scheme and indicated in paragraph 1.2 above.
- 1.7.4 If the date of the presentation meeting is not indicated in the bid document, at least three days' notice will be given to bidders required to attend a presentation as well as the detail of the venue for the presentation.
- 1.7.5 Presentations will be made to the full Bid Evaluation Committee.
- 1.7.6 Points determined by the presentation will be awarded to each bidder by each member of the Bid Evaluation Committee and then an average calculated.
- 1.7.7 Under no circumstances will a presentation by any bidder constitute an award or promise / undertaking to award the contract.

1.8 ADJUDICATION OF BID

- 1.8.1 The Bid Adjudication Committee will consider the recommendations and make the final award. The successful bidder will usually be the bidder scoring the highest number of points or it may be a lower scoring bid on justifiable grounds or no award at all.

2 EVALUATION CRITERIA

Bidders will be evaluated in terms of the 80/20 preferential point system in accordance with the Supply Chain Management Policy of NERSA as well as the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000) and Preferential Procurement Regulations of 2022.

The bid evaluation process shall be carried out in four (4) stages namely:

Stage 1: Mandatory Requirements

Stage 2: Administrative Requirements

Stage 3: Selection Criteria (minimum score of 60 points to proceed to stage 4);

Stage 4: Price and Specific Goals

2.1 Stage 1: Mandatory Requirements

All bidders must be professionally qualified and appropriately registered with the Health Professions Council of South Africa (HPCSA) and proof thereof must be attached. Bidders must fully comply with the **mandatory requirements**, and failure to do so will lead to disqualification.

2.2 Stage 2: Compliance with minimum requirements (Administrative Requirements)

All bids will be examined to determine compliance with the bid requirements and conditions. Non-compliant bidders will be eliminated from further evaluation:

Bidders must furnish the following information as part of the proposal:

- Proof of registration with the Health Professions Council of South Africa (HPCSA).
- **SARS pin letter** with unique personal identification number to enable NERSA to view the taxpayer's profile and tax status. Bidders may also submit a printed TCS together with the proposal.
- **A valid B-BBEE sworn affidavit or certificate** from a Verification Agency accredited by the South African Accreditation System (SANAS). In case of a consortium / joint venture, a consolidated B-BBEE certificate should be submitted for unincorporated entities. The Organisation wishing to claim points should complete the Preference Points Claim Form (Purchases).
- Registration on the National Treasury **Central Supplier Database (CSD)** prior to submitting their bids. Proof of CSD registration summary report must be submitted together with the proposal or Central Supplier Database Number must be provided on the first page of the SCM forms. Failure to submit proof of CSD registration (CSD registration summary report or MA Number on the first page of the SCM forms) will invalidate the bid. Registration requirements may be found online at <https://secure.csd.gov.za>
- **Proof of experience** of the bidder in decommissioning cost study previously undertaken with contactable references
- **Qualifications, certifications and competency** of overall project team members.
- All standard bidding forms must be fully completed and signed in ink, namely Bidder's Disclosure and Preference Points Claim

2.3 Stage 3: Selection Criteria

All bids will be evaluated by the evaluation panel independently in terms of the selection criteria for functionality which will be made up of 100 points as follows:

SELECTION CRITERIA	Points
Experience of the bidder in the industry	20
• No projects completed	0
• 1- 3 similar projects with contactable references	8
• 4 – 6 similar projects with contactable references	14
• 7 + similar projects with contactable references	20
Methodology and Technical approach	40
• The methodology and technical approach does not comply with the requirements in the TOR	0
• The methodology and technical approach is standard and does not address the entire scope of work/deliverables	15
• The methodology and technical approach is discussed in detailed and properly addresses the entire scope of work/deliverables	25
• The methodology and technical approach is comprehensive, raises possible problems and proposed solutions.	40
Project plan/Work plan	20
• No work plan	0
• The proposed work plan has major inconsistencies with the project outcomes	8
• The proposed work plan has minor inconsistencies and the activities does not appropriately address the envisage project outcomes. Some activities are omitted as required in the TOR	14
• The proposed work plan is in compliance with the TOR and the activities are clearly detailed and responds to envisage project outcomes	16
• The proposed work plan is consistent with the approach/methodology and the timing and duration of all activities are appropriate and realistic with the project outcomes	20
Qualification and competency of overall project team members	20
• No experience, and no qualification	0
• 2 year experience and minimum qualification in the field	5
• 3 years' experience and minimum qualification in the field	10
• 4 years' experience and minimum qualification in the field	15
• More than 5 years' experience and minimum qualification in the field	20
TOTAL POINTS	100

All bidders that scores less than (60% points out of 100 points on selection criteria, will not be considered for further evaluation and will be regarded as having submitted a non-responsive bid and will be disqualified for evaluation on **Phase 4**.

2.4 Stage 4: Evaluation in terms of 80/20 preference point system:

Only those bids that achieved the minimum qualifying percentage on selection criteria will be evaluated further in accordance with the 80/20 preference point system as follows:

SECTION A Part 2: Evaluation Process/Criteria

80/20 Preference Point System		
PRICE	POINTS	REQUIRED EVIDENCE
Relative competitiveness of proposed price. The lowest acceptable bid will score 80 points for price.	80	Price Proposal
SPECIFIC GOAL	20	
Black Owned	10	A valid B-BBEE sworn affidavit or certificate
Black Woman Owned	10	A valid B-BBEE sworn affidavit or certificate
TOTAL POINTS	100	

Bidders who wish to claim points for specific goals must ensure that documentary evidence to support the claim is attached to the bid document.

The bid will be awarded to the bidder who scores the highest total number of points in terms of the 80/20 preference point system.

THE APPOINTMENT OF A SERVICE PROVIDER TO RENDER THE EMPLOYEE HEALTH AND WELLNESS PROGRAM (EHWP) SERVICES FOR THE NATIONAL ENERGY REGULATOR OF SOUTH AFRICA FOR A PERIOD OF THREE (3) YEARS.

1. ABOUT NERSA

The National Energy Regulator of South Africa (NERSA) is a regulatory authority established in terms of the National Energy Regulator Act, 2004 (Act No. 40 of 2004), with a mandate to regulate the electricity industry in terms of the Electricity Regulation Act, 2006 (Act No. 4 of 2006), piped-gas industry in terms of the Gas Act, 2001 (Act No. 48 of 2001) and petroleum pipelines industry in terms of the Petroleum Pipelines Act, 2003 (Act No. 60 of 2003).

NERSA's Vision is:

To be a recognized world-class leader in energy regulation

NERSA's Mission is:

To regulate the energy industry in accordance with government laws and policies, standards and international best practices in support of sustainable and orderly development.

2. BACKGROUND

NERSA is a regulatory authority established in terms of Section 3 of the National Energy Regulator Act, 2004 (Act No. 40 of 2004). The Act mandates the Energy Regulator to regulate the electricity, piped-gas and petroleum pipelines industries. NERSA is situated in Arcadia, Pretoria.

The Energy Regulator is supported by the Secretariat made up of management, professional and support staff in disciplines such as engineering, economics, finance and accounting, customer services, legal, communications, human resource management and information resource management. The CEO is also the head of the Secretariat and responsible for the day to day administration of NERSA.

NERSA has an approved staff complement of 253 employees. The estimated number of 273 employees for the 2024/25– 2027/28 financial years is inclusive of the Learnership, Internships and Fixed Term contracts. NERSA's organisational structure comprises of seven business divisions/units in total.

The services are required at the following address:

NERSA
Kulawula House
526 Madiba Street
Arcadia
Pretoria
0083

3. OBJECTIVE

NERSA recognises that employees may experience health, personal, social and other problems which may have an adverse impact on their job performance and/or personal life. Employee wellness is essential in relieving stress and illness in the workplace thereby

SECTION A Part 4: Terms of Reference

increasing employee productivity and ensuring improved organisational performance. To this end, NERSA requires the services of a service provider to render this service to 273 Employees (including 10 Executive Managers and six Senior Managers).

The proposal must be aligned to the Employee Health and Wellness Strategic Framework for the Public Service in four key areas, which includes, but not limited to, HIV & AIDS and TB Management, Health and Productivity Management, SHERQ Management (Safety, Health, Environment, Risk & Quality) and Wellness Management.

4. SCOPE OF THE WORK

A comprehensive and integrated Employee Wellness Programme (EWP) consisting of, but not limited to, the following interventions over a period of three years, renewable annually based on performance.

4.1. Awareness Campaigns and Education

4.1.1 Provide wellness articles in a regular staff newsletter, leaflets to be placed on NERSA notice boards and information points.

4.1.2 Provide on-line wellness interventions via On-line Wellness Portal, E-mails, Videos, Posters, Banners, Desk curios, etc. and on- site workshops on health such as:

- 4.1.2.1 Alcohol and Substance Abuse
 - 4.1.2.2 Smoking
 - 4.1.2.3 Health and Fitness
 - 4.1.2.4 Physical Activities
 - 4.1.2.5 Stress and Mental Health
 - 4.1.2.6 Chronic illnesses
 - 4.1.2.7 Promotion of group schemes e.g. offered by the bank
 - 4.1.2.8 HIV and AIDS information and education
 - 4.1.2.9 Sexual and Reproductive Health
 - 4.1.2.10 Financial Well-Being
 - 4.1.2.11 Gender based Violence and Femicide (GBVF) Matters
 - 4.1.2.12 Workplace Hygiene e.g. pandemic and post-pandemic behaviours etc.
 - 4.1.2.13 Workplace harassment such as; Workplace Bullying, Sexual Harassment, victimisation etc.
- 4.1.3 Provide information and/or educational sessions on issues related to or in line with the National Health calendar such as World AIDS Day, Cancer Day, 16 Days of Activism against Women and Children Abuse, World Mental Health Day, National Nutrition Week, National Obesity Week, Heart Awareness Month etc.
- 4.1.4 Measurement of employee wellbeing through surveys, individual assessment tools etc.

4.2. Health and Wellness Interventions

4.2.1 Deliver holistic annual health and wellness event on-site through a number of on-site consultations, talks, vaccinations and screening on, but not limited to:

- 4.2.1.1 Hypertension testing
- 4.2.1.2 Cholesterol testing
- 4.2.1.3 Glucose testing

SECTION A Part 4: Terms of Reference

- 4.2.1.4 HIV and Aids testing
- 4.2.1.5 Eye-Screening
- 4.2.1.6 Physical and mental health and fitness (including the incorporation of at least two (2) weekly In-house Fitness interventions where one is on Physical Health e.g. Pilates, Yoga etc. on a weekly basis and the other on Mental Health e.g. Meditation Classes etc.)
- 4.2.1.7 Sexual and Reproductive Health
- 4.2.1.8 Weight Management (including Meal Plans, Weight Scales, BMI etc.).

4.2.2 Provide employees with Individual and Team Rewards such as foot soak; massages; spa treatments; lucky draws; T-shirts and goodie bags.

4.3. Counselling Services

Counselling services in the following forms:

4.3.1 Telephone counselling

Provide a professional psychosocial counselling service 24/7 and 365 days access in multiple languages to employees and their dependants, such as:

- 4.3.1.1 Stress management,
- 4.3.1.2 Dealing with alcohol and substance abuse
- 4.3.1.3 Interpersonal Skills Development (Both personal and work-related)
- 4.3.1.3 Dread disease
- 4.3.1.4 Chronic illnesses
- 4.3.1.5 Trauma management
- 4.3.1.6 Absenteeism
- 4.3.1.7 Job Stress and burnout
- 4.3.1.8 Financial wellbeing
- 4.3.1.9 Work life balance
- 4.3.1.10 Legal Advice

4.3.2 Face-to-Face counselling

- 4.3.2.1 Provide confidential face-to-face counselling service to address a wide range of personal and work-related stressors.
- 4.3.2.2 Employees must be able to consult with a counsellor in an area that is geographically closest to where they reside at a time that is most convenient to them.
- 4.3.2.3 A special and tailor-made solution for the counselling and reintegration of employees who have or have been recently cured of dread diseases.
- 4.3.2.4 A post-counselling report on the re-integration of employees who were referred for counselling due to workplace trauma i.e. sexual harassment, workplace bullying, workplace harassment, victimisation etc.
- 4.3.2.5 The proposal must include solutions for workplace reintegration post long absence from work based on issues such as Mental ill-health, Maternity Leave, Sick Leave not due to dread disease, leave to due to the death of a loved one, divorce etc.

4.4 Executive Health Assessment

The executive assessment comprises of the following investigative and consultative interventions:

4.4.1 Executive Wellness Review

An assessment of personal holistic health risks based on the following:

- 4.4.1.1 Family and personal medical history
- 4.4.1.2 Physical activity profile
- 4.4.1.3 Psycho-emotional wellbeing
- 4.4.1.4 Health and lifestyle status
- 4.4.1.5 Nutrition profile
- 4.4.1.6 Illness rating scale

4.4.2 Extensive Physical Assessment including:

- 4.4.2.1 Cardio respiratory tests such as lung capacity testing, Blood Pressure monitoring etc.
- 4.4.2.2 Fitness testing
- 4.4.2.3 Ergonomic review such as Posture, flexibility, functional workplace etc.
- 4.4.2.4 Body composition such as Body Mass Index, waist circumferences etc.
- 4.4.2.5 Special focus areas such as sleep patterns, sun exposure etc.

4.4.3 Special Investigations:

- 4.4.3.1 Blood, urine tests such as glucose, kidney function, liver function, lipogram, full blood count etc.
- 4.4.3.2 Chest x-ray where indicated or appropriate.

4.4.4 Post- consultation:

- 4.4.4.1 Wellbeing counselling on comprehensive health education counselling and the development of an action plan on lifestyle change to mitigate identified risks
- 4.4.4.2 Extensive personal individual report that will identify and categorise appropriate clinical findings, relevant special investigations and change or intervention recommendations
- 4.4.4.3 Referral to medical, behavioural and medical specialists where required as well as feedback and discussion with the executive's medical practitioner, where appropriate.

4.4.5 Multi team interventions:

Tailored Wellbeing Coaching Interventions to each executive's wellness profile that have been developed during the assessment. These include, but not limited to:

- 4.4.5.1 Fitness and Ergonomics
- 4.4.5.2 Diet and Nutrition
- 4.4.5.3 Psycho-emotional
- 4.4.5.4 Therapeutic 30-60 minutes experience addressing posture or flexibility impairment etc.

4.4.6 Executive online care

- 4.4.6.1 Ongoing email wellness communications based on the health risks as identified during the executive care assessments.
- 4.4.6.2 A dedicated executive wellbeing portal offering vital content and self-help.

SECTION A Part 4: Terms of Reference

4.4.6.3 Executives identified as having a chronic disease and those at risk of developing a chronic disease of lifestyle be placed on the bidder's Health Management programme, ensuring that they receive medically-sound advice, ongoing follow-ups, treatment and support to restore and maintain good health.

4.4.6.4 The Medical Assessments shall be conducted at the bidder's Wellness Centre or Wellness Clinic arranged by the bidder.

4.4.7 On-site Occupational Health Nurse

On-site visit of an Occupational Health Nurse once a month to consult employee on day-to-day acute and chronic disease management.

4.5 Team Wellbeing

4.5.1 Deploy tools to assess, discuss and determine appropriate actions to increase team wellbeing, resilience and productivity for each of the seven Divisions.

4.5.2 Evaluate specific wellbeing impacts, such as team dynamics, on the team and determine strategies that can sustain team energy, engagement and wellbeing over the long haul to support the strategic intent.

4.5.3 Present the Divisional Report with Findings and appropriate actions to Human Resources and the relevant Team and facilitate the drafting of a three-year action plan, based on the findings.

4.5.4 Deploy at least one Team Efficacy Intervention for each of the seven Divisions annually.

4.5.5 Deploy two annual Team Efficacy reviews for each Team and communicate the results to HR and the relevant team.

4.5.7 Establish and administer bi-annual Team Rewards for Team Efficacy as Teams reach their Wellbeing, Engagement, Resilience and Productivity Goals.

4.6 Promotional Items and Motivational Speakers

4.6.1 Provision of promotional items/goods for EWP events within a price range of **(R100.00 to R350.00)**; and

4.6.2 Sourcing of Motivational or Health Speakers for main events/interventions as highlighted by our Wellness Calendar, such as:

4.6.2.1 Wellness Days

4.6.2.2 Cancer Day

4.6.2.3 World AIDS Day

4.6.2.4 16 Days of Activism against women and children abuse.

4.6.3.5 Mental Health Awareness

4.6.3.6 National Women's Day

4.6.3.7 Men's Health Day

4.7 Management and Administration will include:

4.7.1 Account Management

4.7.1.1 A dedicated EWP Account Manager must be allocated to NERSA. The core functions will include:

4.7.1.1.1 Partnering with NERSA

4.7.1.1.2 Implementation

4.7.1.1.3 Client Liaison

4.7.1.1.4 Continuous assessment of statistical data and trend analysis

4.7.1.1.5 Proactive alerting of observed risk and threats to NERSA

4.7.1.1.6 Ongoing feedback of themes and trends

4.6.1.1.7 Complaint handling mechanisms

4.6.1.1.8 Return on Investment Analysis

4.7.2 Reviews and Evaluation

- 4.7.2.1 Reviews must be done with reports and will include any themes and trends observed by the Employee Wellness bidder.
- 4.7.2.2 Reporting will include:
 - 4.7.2.2.1 Statistics and calculations
 - 4.7.2.2.2 Data Analysis
 - 4.7.2.2.3 Interpretation of trends
 - 4.7.2.2.4 Value-add and Return on Investment Analysis
 - 4.7.2.2.5 Benchmarking
 - 4.7.2.2.6 Training
 - 4.7.2.2.7 Conclusions and recommendations
- 4.7.2.3 The bidder shall provide signed monthly, quarterly and annual reports of problem profile and possible interventions within seven working days from the end of the Month, Quarter and Year to NERSA

4.8 Monitoring and Evaluation

- 4.8.1 The EWP Account Manager must determine the evaluation criteria, purpose and implementation in consultation with NERSA.
- 4.8.2 The EWP Account Manager must use local and international benchmarking techniques as part of the evaluation of the programme.

4.9. Cost Benefit Analysis

- 4.9.1 The bidder must be able to calculate how much NERSA has saved for every investment in the use of the service.

4.10 Project Outputs or Outcomes

- 4.10.1 The bidder should have specialists in the fields of clinical psychology, industrial and organisational psychology and psychiatry with relevant experience.
- 4.10.2 Trauma debriefing services must be available if required and the turnaround time for normal case response should be no more than 48 hours from request for assistance and for critical incidents should be no more than 24 hours.
- 4.10.3 A 24 hour Care-Line administrated over seven days of the week.

5. DURATION

The software licenses and software assurance must be supplied for a period of three years commencing from 13 January 2025 subject to successful negotiation and signing of a contract by both parties. NERSA shall draft a contract that will be negotiated with the successful bidder. The contract period shall be subject to a quarterly review by NERSA on the proper performance of the contractor.

This Quote is subject to the Government Procurement General Conditions of Contract that may not be amended. Proposals should not be qualified by supplier's own terms and conditions. Failure to withdraw/waive or to renounce the supplier's own terms and conditions, when called upon to do so, may invalidate the bid.

6. PROPOSAL REQUIREMENTS

6.1 Bidders must be able to demonstrate the following in their submission as a minimum requirement:

- 6.1.1 Must be professional and appropriately registered with the Health Professions Council of South Africa (HPCSA).
- 6.2.1 All required services must be rendered by practitioners who are adequately licensed to practice their profession and are registered with their respective statutory councils or other regulatory bodies.
- 6.3.1 Previous experience of a minimum of five years in the industry.
- 6.4.1 An accounts manager with five years' experience in the Employee Assistance Programme (EAP) field.
- 6.5.1 Existing and previous clients and their details where similar work is being done.
- 6.6.1 A summary of the resources that will be provided together with representative CV's to demonstrate the experience and expertise of the proposed staff.
- 6.7.1 A contingency plan when identified resources may not be available for a specific requirement at a specific time.
- 6.8.1 A detailed work plan for the duration of the project (three years).
- 6.9.1 A cost proposal and disbursements for three (3) years.
- 6.10.1 Other relevant information in support of or elucidating the proposal.

6.2 MINIMUM REQUIREMENTS FOR ACCEPTANCE OF THE PROPOSALS

- 6.2.1 The bidder must be a qualified practitioner who is registered with the Health Professions Council of South Africa (HPCSA) and proof thereof must be attached. **Failure to provide proof will invalidate the proposal.**

7. SUBMISSION OF PROPOSALS

7.1 One original plus one Memory stick (USB) submission of the bid must be submitted, together with one copy of the financial proposal should be handed in or delivered to:

The Procurement Manager
NERSA
Kulawula House
526 Madiba Street
Arcadia
Pretoria

For any enquiries, please contact SCM@nersa.org.za or telephonically at (012) 401 4600.

7.2. Minimum Requirements

Bidders must furnish the following information as part of the response:

- 7.2.1 One (1) original plus one (1) Memory stick (USB) submission of the bid must be submitted together with one copy of the financial proposal.
- 7.2.1 SARS Pin letter issued by the South African Revenue Services to enable NERSA to view the taxpayer's profile and tax status. It is the responsibility of bidders to ensure that the tax matters are in order.

SECTION A Part 4: Terms of Reference

- 7.2.2 B-BBEE certificate or sworn affidavit for statistical and B-BBEE accreditation purposes. In case of a consortium / joint venture, a consolidated B-BBEE certificate should be submitted for unincorporated entities.
- 7.2.3 A copy of the company registration certificate as issued by CIPC, as well as share certificate(s) for (Pty) limited companies must also be submitted as part of the bid.
- 7.2.4 Registration on the National Treasury Central Supplier Database (CSD) prior to submitting their bids. Proof of CSD registration summary report must be submitted together with the proposal document or Central Supplier Database Number must be provided on the bid. Failure to submit proof of CSD registration (CSD registration summary report or CSD Registration Supplier Number) will invalidate the bid. Registration requirements may be found online at <https://secure.csd.gov.za>.
- 7.2.5 Company profile that includes the following must be submitted:
- 7.2.5.1 Experience and expertise in providing Employee Wellness Programme;
- 7.2.5.2 A list of current and completed contracts/projects with contactable references, name of institution, description of contract, value of contract, date of contract, contract persons and contact details for each project as per the table below:

Name of Institution	Description of Service	Value of Contract	Date of Contract	Contact Persons	Contact Details
					Tel: Email:

Please include a separate annexure to provide full details.

- 7.2.5.3 Bidders are required to submit reference letters as part of the proposal on the closing date of bid. The format to be used is reflected on SCM supporting documents. This document must be completed by the referee and included in the bid submission. Alternatively, an existing reference letter may be used for this purpose provided it contains all information required in the NERSA standard template and must not be older than one year.
- 7.2.5.4 NERSA reserves the right not to allocate points for track record should a bidder fails to provide a reference letter for each project listed in the track record.
- 7.2.5.5 NERSA reserves the right to verify the information provided and if found to be false or misrepresented, punitive measures may be instituted against the respective party including but not limited to blacklisting and restriction from participating in any future government bid.
- 7.2.5.6 Bidders must comply with the provisions of the Protection of Personal Information Act, 2013 (Act No. 4 of 2014).
- 7.3 Summarised CVs of the proposed project team members must be included. The CVs should highlight the minimum roles, experience of resources and description of similar projects with references as per the table below:

Name of Team Member/s	Minimum roles in the Project	Qualifications, Years of Experience/skills	Description of similar projects with contactable references

Please include a separate annexure to provide full details.

SECTION A Part 4: Terms of Reference

7.4 Bidders must include one copy of the financial proposal/pricing schedule for the duration of the contract (three years – schedule for each year), which must be submitted separately in a sealed envelope.

- 7.4.1 Bidders will be required to give the cost regarding the work to be undertaken for this project. The total ceiling price must be inclusive of all costs plus VAT and must be firm for the duration of the contract period. VAT must be shown separately by VAT Vendors. Price(s) quoted must be valid for at least 120 days from the closing date of bid and a firm delivery period must be indicated;
- 7.4.2 The price must be inclusive of all the service deliverables required by NERSA as stated above.
- 7.4.3 Consultant's rates should be in accordance with the Health Professional Council of South Africa (HPCSA) rates.
- 7.4.4 The pricing schedule must be completed as per the prescribed format only on page 56 of the bid document:

8. RIGHTS OF NERSA NOT TO APPOINT

- 8.1. NERSA reserves the right, not to appoint a bidder and/or to cancel this bid, at its sole discretion, if it is of the opinion that the bids submitted do not meet the requirements of the bid document, the service is no longer required or for any other reason NERSA may deem fit.
- 8.2. NERSA reserves the right to contact the references provided. In the event that the majority of references contacted provide negative feedback on the bidder, NERSA reserves the right not to appoint that specific bidder.
- 8.3. Although NERSA wishes to enter into a contract with the appointed bidder/s, NERSA reserves the right to procure the services outside the contract where it is deemed necessary.
- 8.4. NERSA reserves the right to award the bid in full or in parts

9. REFERENCE LETTER

- 9.1 NERSA reserves a right to contact references mentioned in the track record list. In order to comply with the Protection of Personal Information Act, 2013 (Act No. 4 of 2013) bidders have a responsibility to obtain the consent of the submitted references prior to sharing their personal information with NERSA e.g. testimonials letters.
- 9.2 The template below must therefore be completed by the referees in the prescribed format only:

CONTACTABLE REFERENCE TEMPLATE

To: National Energy Regulator of South Africa (NERSA)

I, the undersigned being duly authorized to do so, hereby furnish a reference to NERSA relative to Bid No. THE APPOINTMENT OF A SERVICE PROVIDER TO RENDER THE EMPLOYEE HEALTH AND WELLNESS PROGRAM (EHWP) SERVICES FOR THE NATIONAL ENERGY REGULATOR OF SOUTH AFRICA FOR A PERIOD OF THREE (3) YEARS.

Name of Bidder:

Description of Goods / Services provided:

.....

Duration: Year-Month-Day when the Goods / Services were provided:

.....

Start date (Year- Month -Day) when the above was provided:

End date (Year- Month -Day) when the above was provided:

Rate the overall level of satisfaction with the services conducted as per the following ratings: 1-5 (1-Poor, 2-Fair, 3-Good, 4-Very Good; 5-Excellent):

.....

Provide further comments in support of the level of satisfaction indicated in line with the rating provided in respect to did they meet or comply with all your requirements as specified in the contract:

.....

Adherence to turnaround times:

Indicate whether there were any disputes for poor performance which resulted in mediation, arbitration or litigation

Name of authorised person:

Signature: **Date**

Telephone/Mobile:

Email:

Completed on behalf (Name of Client):

NB: This document must be completed by the referee and included in the bid submission. Alternatively, the client's letterhead may be used for this purpose provided it complies with the selection criteria requirements. A separate form must be completed for each reference as required in the evaluation criteria.

Information provided will be verified and if found to be false or misrepresented, punitive measures will be instituted against the respective party including blacklisting and restriction from participating in any future government bid.

CONTRACT FORM: RENDERING OF SERVICES

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

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

1. I/we hereby undertake to render services described in the attached bidding documents to NERSA in accordance with the requirements and task directives/proposals terms of references stipulated in Bid Number **NERSA/2425/HRD/EHWP/BID003** at the price/s quoted. My/our offer/s remain binding upon me/us and open for acceptance by the Purchaser during the validity period indicated and calculated from the closing date of the bid.
2. The following documents shall be deemed to form and be read and construed as part of this agreement:
 - 2.1 Bidding documents, viz
 - ☐ Invitation to bid
 - ☐ SARS Tax Compliance Status Pin Letter / Printed Tax clearance certificate
 - ☐ Pricing schedule(s)
 - ☐ Proposal / filled in Terms of Reference as per my/our bid dated (date)
 - ☐ Preference certificates in terms of the Preferential Procurement Regulations, 2001
 - ☐ Declaration Certificate for Local Production and Content Designated Sector Form
 - ☐ Bidder's Disclosure
 - ☐ Declaration of bidder's past SCM practices
 - ☐ Certificate of independent bid determination
 - ☐ Special Conditions of Contract
 - 2.2 General Conditions of Contract
 - 2.3 Other (specify)
3. I/we confirm that I/we have satisfied myself as to the correctness and validity of my/our bid; that the price(s) and rate(s) quoted cover all the services specified in the bidding documents; that the price(s) and rate(s) cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.
4. I/we accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me/us under this agreement as the principal liable for the due fulfilment of this contract.
5. I/we declare that I/we have no participation in any collusive practices with any bidder or any other person regarding this or any other bid.
6. I confirm that I am duly authorised to sign this contract.

NAME (PRINT) _____

CAPACITY _____

SIGNATURE _____

NAME OF FIRM _____

DATE _____

WITNESSES

1 _____

2 _____

DATE: _____

CONTRACT FORM: RENDERING OF SERVICES**PART 2 (TO BE FILLED IN BY THE PURCHASER)**

1. I in my capacity as accept your bid under reference number **NERSA/2425/HRD/EHWP/BID003** dated For the rendering of services indicated hereunder and/or further specified in the annexures.
2. An official order indicating service delivery instructions is forthcoming.
3. I undertake to make payment for the services rendered in accordance with the terms and conditions of the contract within 30 (thirty) days after receipt of an invoice.

DESCRIPTION OF SERVICE	PRICE (VAT INCL)	COMPLETION DATE	PREF POINTS CLAIMED FOR SPECIFIC GOALS
THE APPOINTMENT OF A SERVICE PROVIDER TO RENDER THE EMPLOYEE HEALTH AND WELLNESS PROGRAM (EHWP) SERVICES FOR THE NATIONAL ENERGY REGULATOR OF SOUTH AFRICA FOR A PERIOD OF THREE (3) YEARS.			

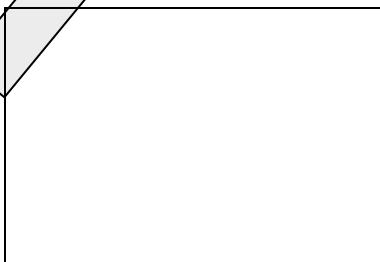
4. I confirm that I am duly authorised to sign this contract.

SIGNED AT ON

NAME (PRINT)

SIGNATURE

OFFICIAL STAMP



WITNESSES

1

2

DATE:

SECTION B

SECTION B

SECTION B Part 2: Special Conditions of Bid and General Conditions of Contract

SPECIAL CONDITIONS THAT THE BIDDER NEEDS TO ACCEPT

	SPECIAL CONDITIONS OF BID	CONFIRMATION			
		Yes	No	N/A	If no, indicate deviation
1	GENERAL				
1.1	Bidders must indicate a confirmation response against each paragraph in this part of Section B covering both the Special Conditions of Bid and the Special Conditions of Contract by marking the YES box or by marking the NO box. The bidder must clearly state if a deviation from these special conditions are offered and the reason therefore. If an explanatory note is provided, the paragraph reference must be indicated in a supporting appendix to this part of the bid submission. Answering questions or supplying detail by referring to other sections will not be accepted.				
1.2	Some of the confirmation blocks in this part are shaded. Choosing a response in one of the shaded blocks will deem your bid to be non-responsive in line with the instructions in this part.				
1.3	Should bidders fail to indicate a confirmation response, NERSA will assume that the bidder is not in compliance or agreement with the statement(s) as specified in this bid document.				
1.4	Bids not completed in this manner may be considered incomplete and rejected.				
1.5	The client shall not be liable for any expense incurred in the preparation and submission of a bid.				
2	BID SUBMISSION CONDITIONS, INSTRUCTIONS AND EVALUATION PROCESS / CRITERIA				
2.1	Submission conditions and Instructions as well as the evaluation process / criteria have been noted.				
3	SPECIAL CONDITIONS OF BID AND CONTRACT				
3.1	The Special Conditions of Bid and the Special Conditions of Contract of this Request for Bid must be accepted. Non-acceptance may be deemed to be non-responsive.				
4	ADDITIONAL INFORMATION REQUIREMENTS				
4.1	During evaluation of the bids, additional information may be requested in writing from bidders. Replies to such request must be submitted, within 3 (three) working days or as otherwise indicated. Failure to comply, may lead to your bid being disregarded.				

SECTION B Part 2: Special Conditions of Bid and General Conditions of Contract

SPECIAL CONDITIONS OF BID		CONFIRMATION			
		Yes	No	N/A	If no, indicate deviation
5	VENDOR INFORMATION				
5.1	The successful bidder will be required to complete a vendor information form detailing the organisation's complete profile.				
6	FORMAT OF BIDS				
6.1	Bidders must complete all the necessary bid documents and undertakings required in this bid document. Bidders are advised that their proposal should be concise, written in plain English and simply presented. Bidders are to set out their proposal in the format prescribed hereunder:				
6.2	Special conditions of bid and contract				
6.2.1	Bidders must complete and return the Special Conditions of Bid and Contract.				
6.3	SARS Tax Clearance Certificate(s)/ Compliance				
6.3.1	Bidders are required to submit their unique personal identification number (pin) issued by SARS to enable NERSA to view the taxpayer's profile and tax status. Bidders <u>may</u> also submit a printed Tax Compliance Status (TCS) together with the bid. In bids where consortia / joint ventures / sub-contractors are involved, each party must submit a separate proof of TCS / pin / CSD number.				
6.4	Bidder's Disclosure				
6.4.1	Each party to the bid must complete and return the Bidder's Disclosure. Bids submitted without a completed and signed Bidder's Disclosure may be deemed to be non-responsive.				
6.5	Preference Points Claim Form in terms of the Preferential Procurement Regulations 2001 (Purchases)				
6.5.1	Bidders must complete and return the Preference Points Claim Form (Purchases).				

SECTION B Part 2: Special Conditions of Bid and General Conditions of Contract

	SPECIAL CONDITIONS OF BID	CONFIRMATION			
		Yes	No	N/A	If no, indicate deviation
6.5.2	For a consortium or joint venture: <input type="checkbox"/> In case of a consortium / joint venture , a consolidated B-BBEE certificate should be submitted for unincorporated entities. <input type="checkbox"/> The Organization wishing to claim points should complete the Preference Points Claim Form (Purchases				
6.6	Invitation to Bid				
6.6.1	Bidders must complete, sign and return the full "Invitation to Bid" document. Bids submitted without a completed and signed Invitation to Bid may be deemed to be non-responsive.				
6.7	Technical Proposal				
6.7.1	Bidders must, at least cover the under-mentioned in their Technical Approach , return as part of their submission: <input type="checkbox"/> Describe, in detail, exactly how they propose to carry out the activities to achieve the outcomes identified in the terms of reference. They should identify any possible problems that might hinder delivery and indicate how they will avoid, or overcome such problems. <input type="checkbox"/> Describe how the work will be managed. Provide an organisation chart clearly indicating: <ul style="list-style-type: none"> ▪ The lines of reporting and supervision within the bidder's team ▪ The lines of reporting between the bidder and NERSA and other stakeholders, if applicable <input type="checkbox"/> <u>Demonstrate how the services will be rendered by addressing the scope of work.</u>				
6.8	Team details				
6.8.1	In this part the bidders must provide allocate account manager.				
6.8.2	Submit summarised CVs of the proposed project team members must be included. The CVs should highlight the minimum roles, experience of resources and description of similar projects with references.				
6.9.3	Membership of professional bodies (Institutes, Affiliates, Accreditations or Associates)? Attach company registration certificates.				
6.9	Experience in this field <input type="checkbox"/> Demonstrate experience and expertise in in providing Employee Wellness Programme with contactable references.				

SECTION B Part 2: Special Conditions of Bid and General Conditions of Contract

	SPECIAL CONDITIONS OF BID	CONFIRMATION			
		Yes	No	N/A	If no, indicate deviation
6.9.1	Bidders should provide in this part, and return as part the submission, at least the following information: <input type="checkbox"/> Track record of similar projects.				
6.10	Samples				
6.10.1	No samples required.				
6.11	Pricing Schedule				
6.11.1	The bidder must take the following into consideration when completing the Pricing Schedule: <ul style="list-style-type: none"> Reference must be made to the scope of work on the Terms of Reference. Price(s) has to be in line with the Guide on Hourly Fee Rates for Consultants as regulated by the Department of Public Service (DPSA). The Latest Consultants Fees can be downloaded from DPSA website at http://www.dpsa.gov.za/dpsa2g/documents.asp#consultants_fees 				
6.11.2	Bidders are required to include one (1) copy of the financial proposal/pricing schedule , which must be submitted separately in a sealed envelope.				
6.12	B-BBEE Certificate				
6.13.1	Bidders should provide their original and valid B-BBEE certificate or a certified copy thereof as part of the bid document as issued by verification agencies accredited by SANAS or registered auditors approved by IRBA. In case of a consortium / joint venture, a consolidated B-BBEE certificate should be submitted.				
6.13.2	All Exempted Micro Enterprises (EMEs) must submit a certified sworn affidavit as prescribed by the DTI or certificate issued by the Companies & Intellectual Properties Commission (CIPC) confirming annual turnover of R10M or less and level of black ownership.				
6.13.3	Bidders who do not submit B-BBEE Status Level Verification Certificates or who are non-compliant contributors to B-BBEE will not be disqualified from the bidding process.				
6.14	VETTING OF BIDDERS				
6.14.1	NERSA reserves the right to subject any bidder for a security clearance through the State Security Agency (South Africa)				
6.15	LABOUR LEGISLATIVE REQUIREMENTS				
6.15.1	Proof of company registration as issued by (CIPC) as well as share certificate(s) for (Pty) limited companies with other legislative requirements such as UIF, COIDA and PAYE must be submitted together with bid document.				

SECTION B Part 2: Special Conditions of Bid and General Conditions of Contract

SPECIAL CONDITIONS OF BID		CONFIRMATION			
		Yes	No	N/A	If no, indicate deviation
6.16	CENTRAL SUPPLIER DATABASE				
6.16.1	Bidders must be registered on the National Treasury Central Supplier Database (CSD) prior to the submission of this bid. Proof of CSD registration summary report must be submitted together with the bid document or Central Supplier Database Number must be provided on the Invitation to Bid form.				
6.16.2	Failure to submit proof of CSD registration (CSD registration summary report or MA Number) will invalidate the bid. Registration requirements may be found online at https://secure.csd.gov.za .				

SECTION B Part 2: Special Conditions of Bid and General Conditions of Contract

	SPECIAL CONDITIONS OF BID	CONFIRMATION			
		Yes	No	N/A	If no, indicate deviation
1	GENERAL CONDITIONS OF CONTRACT				
1.1	<p>The bid is subjected to the General Conditions of Contract (GCC). The GCC can be downloaded from the NERSA website at www.nersa.org.za or from National treasury website at http://www.treasury.gov.za</p> <p>Bids' should not be qualified by own terms & conditions.</p> <p>Failure to withdraw/waive or to renounce the bidder's own terms & conditions of bid, when called upon to do so, may invalidate the bid.</p>				
2	CONFIDENTIALITY				
2.1	<p>The bid 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.</p> <p>Bidders shall undertake to limit the number of copies of this document.</p>				
2.2	All bidders are bound by a confidentially agreement preventing the unauthorised disclosure of any information regarding NERSA or of its activities to any other organisation or individual. The bidders may not disclose any information, documentation, data or products to other clients without written approval of the Energy Regulator or the delegate.				
2.3	"Confidential information" includes any information or knowledge whatsoever relating to NERSA or any of its divisions, including but not limited to all information in whatever form (tangible or intangible), reports (whether generated by NERSA or service providers to NERSA), documentation, specifications, know-how, accounts and computer readable data relating or pertaining to the project, NERSA or any of its divisions.				
3	INTELLECTUAL PROPERTY, INVENTIONS AND COPYRIGHT				
3.1	Copyright of all documentation relating to this contract belongs to the client. The successful bidder may not disclose any information, documentation or products to other clients without the written approval of the Energy Regulator or the delegate.				

SECTION B Part 2: Special Conditions of Bid and General Conditions of Contract

	SPECIAL CONDITIONS OF BID	CONFIRMATION			
		Yes	No	N/A	If no, indicate deviation
3.2	All the intellectual property rights arising from the execution of this contract shall vest in NERSA who shall be entitled to cede and assign such to the Department of Energy and the contractor undertakes to honour such intellectual property rights and all future rights by keeping the know-how and all published and unpublished material confidential.				
3.3	In the event that the contractor or any project team member would like to use information or data generated by the project, for academic or any other purpose, prior written permission must be obtained from the client. Such permission will not be unreasonably withheld and if it is withheld, written reasons will be provided.				
3.4	NERSA shall own all deliverables produced by the Contractor during the course of, or as part of the contract whether capable of being copyrighted or not ("IP") and which are or may become eligible for copyright under the laws of the Republic of South Africa and which relates to the contract or which arises directly from this contract. This IP NERSA shall be entitled to freely cede and assign to the Department of Energy. No other document needs to be executed to give effect to this cession, assignment or transfer.				
3.5	The provisions of this clause 3 shall only apply to such IP that is created during the course and scope in terms of this contract.				
3.6	The Contractor acknowledges and agrees that each provision of clause 3 is separate, severally and separately enforceable from any other provisions of this contract.				
3.7	The invalidity or non-enforceability of any one or more provision hereof, shall not prejudice or effect the enforceability and validity of the remaining provisions of this contract.				
3.8	This clause 3 shall survive termination of this contract.				
3.9	Non-acceptance of clause 3 may deem your bid to be non-responsive.				
4	NON-COMPLIANCE WITH DELIVERY TERMS				

SECTION B Part 2: Special Conditions of Bid and General Conditions of Contract

	SPECIAL CONDITIONS OF BID	CONFIRMATION			
		Yes	No	N/A	If no, indicate deviation
4.1	As soon as it becomes known to the contractor that he / she will not be able to deliver the services within the delivery period and / or against the quoted price and / or as specified, NERSA must be given immediate written notice to this effect. NERSA reserves the right to implement remedies as provided for in the GCC.				
5	WARRANTS				
5.1	The contractor warrants that it has the capability, experience, expertise and skills necessary and is able to conclude this Agreement to the satisfaction of NERSA.				
5.2	The contractor undertakes to perform the services in a professional manner.				
5.3	Although the contractor will be entitled to provide services to persons other than NERSA, the contractor shall not without the prior written consent of NERSA, be involved in any manner whatsoever, directly or indirectly, in any business or venture which competes or conflicts with the obligations of the contractor to provide services.				
6	PARTIES NOT AFFECTED BY WAIVER OR BREACHES				
6.1	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 .				
6.2	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.				
7	OBLIGATION				
7.1	The contractor shall perform all aspects of the services as more fully described in the terms of reference and shall comply with all reasonable instructions, requests and/or directions as may be issued by NERSA from time to time.				

SECTION B Part 2: Special Conditions of Bid and General Conditions of Contract

	SPECIAL CONDITIONS OF BID	CONFIRMATION			
		Yes	No	N/A	If no, indicate deviation
8	PROJECT PLAN				
8.1	The contractor shall within 2 (two) weeks after signing this contract, submit to NERSA, a draft project plan for consideration and approval.				
8.2	The approved project plan submitted in terms of clause 8.1 above shall be binding on the contractor.				
9	RETENTION				
9.1	On termination of this agreement, or at the end of the contract period, the contractor shall, on demand hand over all documentation provided as part of the project and all deliverables, etc., without the right of retention, to NERSA.				
9.2	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.				
10	INDEMNITY				
10.1	The contractor hereby indemnifies and holds harmless NERSA's employees, agents or its duly authorized representatives from and against any and all claims, liabilities, losses, costs, expenses (including attorneys' fees) and damages, which NERSA may suffer and/or incur arising out of and/or resulting from wilful misconduct, negligent act or omission by the contractor in performance of the Services in terms of this agreement.				
10.2	The indemnification under this clause shall survive termination of this agreement.				
11	UNDERTAKINGS BY THE CONTRACTOR				
11.1	The contractor shall not, during the contract period or extended contract period, directly or indirectly entice away any employee of NERSA.				
12	FORCE MAJEURE				
12.1	Should the affected Party be unable to fulfil its obligations in terms of this agreement for a period of fourteen (14) days or such other reasonable period from the date of notification to the other Party of a <i>force majeure</i> , then the other Party shall be entitled to terminate this agreement forthwith if justifiable under the circumstances, by written notice to that effect to the affected Party.				

SECTION B Part 2: Special Conditions of Bid and General Conditions of Contract

	SPECIAL CONDITIONS OF BID	CONFIRMATION			
		Yes	No	N/A	If no, indicate deviation
13	INDEPENDENT CONTRACTOR				
13.1	The contractor agrees and acknowledges that it is an independent contractor and that this agreement shall not be construed as creating any relationship of employment, agency, partnership or joint venture between the Parties. Accordingly the contractor has no authority to represent, act on behalf of or bind NERSA in anyway whatsoever.				
13.2	The contractor shall not issue any press release, make or publish any statement or other communication relating to, connected with or arising out of this agreement or the rendering of the Services without the prior written consent of NERSA.				
14	ASSIGNMENT				
14.1	The provisions of this agreement shall automatically transfer to and continue to exist to any legal successors of the Parties.				
15	DATA PROTECTION				
15.1	The Parties acknowledge their respective obligations to comply with the substantive provisions of the Protection of Personal Information Act, 2013 (Act No. 4 of 2014) (hereinafter referred to as 'Act').				
15.2	Where any Party receives any personal information as defined in the Act such Party shall ensure that it fully complies with the provisions of the Act and only deals with or processes such personal information to fulfil its obligations in terms of this Agreement.				
15.3	The personal information received by a Party shall not be processed or disclosed for any other purpose, but the purpose that it was provided for, without the consent of the disclosing Party.				
15.4	Each Party therefore understands and agrees, notwithstanding any contrary provision in any other agreement between the Parties, that each Party retains its full rights to pursue legal or equitable remedies, in the event of any breach or threatened breach of the provisions of with the Act when dealing with and/or processing personal information of the disclosing Party, and may prevent the other Party, any of its agents or subcontractors, or any third party who have received records or information from that Party, from violating this Agreement by any legal means available.				

SECTION B Part 2: Special Conditions of Bid and General Conditions of Contract

	SPECIAL CONDITIONS OF BID	CONFIRMATION			
		Yes	No	N/A	If no, indicate deviation
15.5	Each Party further understands that the violation of the provisions dealing with the Act may subject that Party to applicable legal penalties, including those provided under the Act.				
15.6	Within thirty (30) days after the termination of this Agreement, for whatever reason, the receiving Party of either Party's personal information shall return same or at the discretion of the disclosing Party of such personal information, destroy such personal information, and shall not retain copies, samples or excerpts thereof.				
15.7	In cases where the disclosing Party has elected for the personal information to be destroyed, as provided for in clause 18.6 above, the receiving Party shall, within ten (10) days of receiving the instruction to destroy the personal information, send an affidavit confirming the destruction of such personal information.				
15.8	The Parties acknowledge their respective obligations to comply with the substantive provisions of the Protection of Personal Information Act, 2013 (Act No. 4 of 2014) (hereinafter referred to as 'Act').				
15.9	Where any Party receives any personal information as defined in the Act such Party shall ensure that it fully complies with the provisions of the Act and only deals with or processes such personal information to fulfil its obligations in terms of this Agreement.				

TAX CLEARANCE CERTIFICATE REQUIREMENT

- 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 Tax Compliance Status (TCS) 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 In bids where consortia / joint ventures / sub-contractors are involved, each party must submit a separate proof of TCS / pin / CSD number.

- 2.5 Where no TCS is available but the bidder is registered on the Central Supplier Database (CSD), a CSD number must be provided with the Tax Compliance System Pin on the on the Invitation to Bid form.

- 2.6 International bidders do not have to be a locally registered entity in South Africa in order to bid. See QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS on the Invitation to Bid Form. Therefore, if responses to all questionnaire were no, then it's not a requirement to register for a tax compliance status system pin code from the South African Revenue Service (SARS).

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

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

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

2. Bidder's declaration

- 2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise, employed by the state? **YES/NO**
- 2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

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

SECTION B Part 3: Bidder's Disclosure

[illegible]

Please provide a separate annexure to provide full details of the list of directors / trustees / members / shareholders. In case of trustees, joint venture, consortium and sub-contractor the details of ownership of the company should be provided with the bid document.

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

2.2.1 If so, furnish particulars:

.....
.....

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

2.3.1 If so, furnish particulars:

.....
.....

3 DECLARATION

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

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

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

3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.

3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.

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

3.6 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

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

SECTION B Part 3: **Bidder's Disclosure**

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

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

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

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

PREFERENTIAL PROCUREMENT REGULATIONS 2022

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

NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES 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 equal to or above R2001 and up to R50 million (all applicable taxes included).

1.2 Preference points for this bid shall be awarded for:

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

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

POINTS

1.3.1 PRICE 80

1.3.2 SPECIFIC GOALS 20

Total points for Price and specific goals must not exceed 100

1.4. 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. DEFINITIONS

2.1 **“all applicable taxes”** includes value-added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies;

2.2 **“bid”** means a written offer in a prescribed or stipulated form in response to an invitation by NERSA for the provision of services, works or goods, through price quotations, advertised competitive bidding processes or proposals;

2.3 **comparative price”** means the price after the factors of a non-firm price and all unconditional discounts that can be utilized 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, skill and knowledge in an activity for the execution of a contract;

2.5 **“contract”**Error! Bookmark not defined. means the agreement that results from the acceptance of a bid by an organ of state;

2.6 **“EME”** means any enterprise with an annual total revenue of R5 million or less.

SECTION B Part 5: Preference Points Claim Form (Purchases)

2.7 **“Firm price”** means the price that is only subject to adjustments in accordance with the actual increase or decrease resulting from the change, imposition, or abolition of customs or excise duty and any other duty, levy, or tax, which, in terms of the law or regulation, is binding on the contractor and demonstrably has an influence on the price of any supplies, or the rendering costs of any service, for the execution of the contract;

2.8 **“rand value”** means the total estimated value of a contract in South African currency, calculated at the time of bid invitations, and includes all applicable taxes and excise duties;

3. ADJUDICATION USING A POINT SYSTEM

3.1 The bidder obtaining the highest number of total points will be awarded the contract.

3.2 Preference points shall be calculated after prices have been brought to a comparative basis taking into account all factors of non-firm prices and all unconditional discounts;

3.3 Points scored must be rounded off to the nearest 2 decimal places.

3.4 In the event that two or more bids have scored equal total points, the successful bid must be the one scoring the highest number of preference points for specific goals.

3.5 However, when selection criteria is part of the evaluation process and two or more bids have scored equal points including equal preference points for specific goals, the successful bid must be the one scoring the highest score on selection criteria.

3.6 Should two or more bids be equal in all respects the award shall be decided by the drawing of lots.

4. POINTS AWARDED FOR PRICE

4.1 THE 80/20 PREFERENCE POINT SYSTEMS

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

80/20

$$P_s = 80 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

Where

P_s = Points scored for comparative price of bid under consideration

P_t = Comparative price of bid under consideration

P_{\min} = Comparative price of lowest acceptable bid

SECTION B Part 5: Preference Points Claim Form (Purchases)

5. POINTS AWARDED FOR SPECIFIC GOALS

7.1.1 Points to be awarded to a bidder based on his or her specific goals see below table:

PRICE	MAXIMUM POINTS	REQUIRED EVIDENCE
Price	80	
Specific Goal	20	
▪ Black Owned	10	Valid BBB-EE certificate or sworn affidavit
▪ Woman Owned	10	Valid BBB-EE certificate or sworn affidavit
Total Points	100	

Bidders who wish to claim points for specific must ensure that documentary evidence to support the claim is attached to the bid document as specified in table above.

6. DECLARATION WITH REGARD TO COMPANY/FIRM

6.1 Name of firm:

6.2 VAT registration number:

6.3 Company registration number:

6.4 TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
 - ☐ One-person business/sole propriety
 - ☐ Close corporation
 - ☐ Company
 - ☐ (Pty) Limited
- [TICK APPLICABLE BOX]

6.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

.....

.....

.....

.....

.....

.....

SECTION B Part 5: Preference Points Claim Form (Purchases)

6.6 COMPANY CLASSIFICATION

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

6.7 MUNICIPAL INFORMATION

Municipality where business is situated

Registered Account Number.....

Stand
Number.....

6.8 Total number of years the company/firm has been in business?

9.9 I hereby declare under Oath that:

(a) The Enterprise is _____% Black Owned using the flow-through principle as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9(1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013,

(b) The Enterprise is _____% Black Female Owned as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9 (1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013,

(c) Black Designated Group Owned % Breakdown as per the definition stated above:

- Black Youth % = _____%
- Black Disabled % = _____%
- Black Unemployed % = _____%
- Black People living in Rural areas % = _____%
- Black Military Veterans % = _____%

6.10 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, indicated in paragraph 5 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I / we acknowledge that:

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

SECTION B Part 5: Preference Points Claim Form (Purchases)

- (iii) In the event of a contract being awarded as a result of points claimed as shown in paragraph 5 the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;
- (iv) If the Specific goals has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –
 - (a) disqualify the person from the bidding process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) restrict the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, from obtaining business from any organ of state for a period not exceeding 10 years, after the audi alteram partem (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution

Signature(s) of Bidder(s): _____ Date: _____

Address _____

WITNESSES: 1. _____ 2. _____

INVITATION TO BID PART A

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENT OF NERSA

BID NUMBER	NERSA/2425/HRD/EHWP/BID003	CLOSING DATE	21 JUNE 2024	CLOSING TIME	11:00
DESCRIPTION	THE APPOINTMENT OF A SERVICE PROVIDER TO RENDER THE EMPLOYEE HEALTH AND WELLNESS PROGRAM (EHWP) SERVICES FOR THE NATIONAL ENERGY REGULATOR OF SOUTH AFRICA FOR A PERIOD OF THREE (3) YEARS.				
VALIDITY	Offer to be valid for 120 (19 OCTOBER 2024) days from the closing date (21 JUNE 2024).				

The successful bidder will be required to fill in and sign a written Contract Form

BID DOCUMENTS MAY BE:

DEPOSITED IN THE BID/TENDER BOX SITUATED AT
(Street address)

NERSA, Kulawula House, 526 Madiba
(Vermeulen) Street, Arcadia, Pretoria

OR

* POSTED TO:

The Procurement Manager, NERSA, PO Box
40343, Arcadia, 0007, South Africa

OR

HANDED IN AT RECEPTION SITUATED AT
(Street address)

NERSA, Kulawula House, 526 Madiba
(Vermeulen) Street, Arcadia, Pretoria, prior to
the official closure time and the bidder must
obtain a receipt, indicating the time of
delivery, from the receptionist.

No faxed or e-mailed bids will be accepted

Bidders should ensure that bids are delivered to NERSA before the closing date and time to the correct physical address. If the bid is late, it will not be accepted for consideration.

*** Refer to Paragraph 6 of the "Special Conditions of Bid and Contract: Portion 1".**

- ☐ Bids can be delivered and deposited into the bid / tender box between 08:00 and 16:30, Mondays to Thursdays and 08:00 to 16:00 on Fridays, prior to the closing date, and between 08:30 and 11:00 on the closing date.
- ☐ All bids must be submitted on the official forms (not to be re-typed).
- ☐ This bid is subject to the General Conditions of Contract (GCC) and, if applicable, any other Special Conditions of Contract.
- ☐ Bids submitted that do not comply with the following may not be considered for evaluation:
 - A bid that is not in the format prescribed.
 - A bid without some or all of the required documents.
 - Pricing schedules not in the required format.
 - Bids without the required number of copies.
- ☐ Any queries regarding bidding procedures and technical information may be directed to:
 - e-Mail: scm@nersa.org.za
 - Tel.: 012 401 4795 / 012 401 4696 /
 - Fax: 012 401 4700

SECTION B Part 6: Invitation to Bid

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)					
BID NUMBER:	NERSA/2425/HRD/EHWP/BID003		CLOSING DATE:	21 JUNE 2024	CLOSING TIME: 11:00
DESCRIPTION	THE APPOINTMENT OF A SERVICE PROVIDER TO RENDER THE EMPLOYEE HEALTH AND WELLNESS PROGRAM (EHWP) SERVICES FOR THE NATIONAL ENERGY REGULATOR OF SOUTH AFRICA FOR A PERIOD OF THREE (3) YEARS.				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT NERSA, KULAWULA HOUSE, 526 MADIBA (VERMEULEN) STREET, ARCADIA, PRETORIA					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON			CONTACT PERSON		
TELEPHONE NUMBER			TELEPHONE NUMBER		
FACSIMILE NUMBER			FACSIMILE NUMBER		
E-MAIL ADDRESS			E-MAIL ADDRESS		
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA.....
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> 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?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?		<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS					
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE A BRANCH IN THE RSA?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.					

PART B

TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:
1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.
1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
1.4. THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).
2. TAX COMPLIANCE REQUIREMENTS
2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

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

SIGNATURE OF BIDDER:

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

DATE:

TECHNICAL PROPOSAL

Submit a detailed proposal that demonstrates innovation to ensure delivery in accordance with the Terms of Reference (Scope of work).

SECTION B Part 8: Experience

EXPERIENCE IN THIS FIELD

The bidder should demonstrate experience in providing Employee Wellness Programme and must be submitted with contactable references:

No.	Name of institution	Description of service	Contract period	Contact details
1.				Name & Surname: Tel: Email:
2.				Name & Surname: Tel: Email:
3.				Name & Surname: Tel: Email:
4.				Name & Surname: Tel: Email:
5.				Name & Surname: Tel: Email:
6.				Name & Surname: Tel: Email:
7.				Name & Surname: Tel: Email:
8.				Name & Surname: Tel: Email:
9.				Name & Surname: Tel: Email:
10.				Name & Surname: Tel: Email:

The list is not limited to ten (10) institutions for experience on the Table. Please include a separate annexure to provide full details.

NB: Completion of this Table is compulsory as bidders will score zero points on evaluation criteria if not submitted.

NERSA reserves a right to contact references mentioned in the track record list. In order to comply with the Protection of Personal Information Act, 2013 (Act No. 4 of 2013) bidders have a responsibility to obtain the consent of the submitted references prior to sharing their personal information with NERSA e.g. testimonials letters

SECTION B Part 9: Team Details (CV Template Guideline)

CV TEMPLATE GUIDELINE

1. **Family name** _____
2. **First name:** _____
3. **Date of birth:** _____
4. **Nationality** _____
5. **Education/Key qualifications**

Institution (Date from - Date to)	Degree(s) or Diploma(s) obtained

6. **Membership of professional bodies** _____
7. **Other skills (e.g. computer literacy, etc.)** _____

8. **Present position and minimum role in the project:** _____
9. **Years within the organisation:** _____
10. **Years of experience/skills:** _____

11. **Description of similar projects with contactable references**

Date (From – To) (mm/yy)	
Organisation	
Position	
Responsibilities	
Description of similar projects	
Contact details of reference	
Name	
Tel	
Email	

Date (From – To) (mm/yy)	
Organisation	
Position	
Responsibilities	
Description of similar projects	
Contact details of reference	
Name	
Tel	
Email	

CV OF PROPOSED PROJECT TEAM MEMBERS

Submit summarised CVs of the proposed project team members must be included. The CVs should highlight the minimum roles, experience of resources and description of similar projects with references as per the table below:

Name of Team Member/s	Minimum roles in the Project	Qualifications, Years of Experience/skills	Description of similar projects with contactable references

Please include a separate annexure to provide full details.

SECTION B Part 10: Pricing Schedule

PRICING SCHEDULE

(Services: Professional)

BID DESCRIPTION: THE APPOINTMENT OF A SERVICE PROVIDER TO RENDER THE EMPLOYEE HEALTH AND WELLNESS PROGRAM (EHWP) SERVICES FOR THE NATIONAL ENERGY REGULATOR OF SOUTH AFRICA FOR A PERIOD OF THREE (3) YEARS.

The appointment of a service provider to render the Employee Health and Wellness Program (EHWP) services for the National Energy Regulator of South Africa for a period of three (3) Years.

OFFER TO BE VALID FOR 120 (19 OCTOBER 2024) DAYS FROM THE CLOSING DATE OF BID: 21 JUNE 2024

- 1 The accompanying information must be used for the formulation of proposals.
- 2 Bidders must indicate a **ceiling price** for the contract duration of three (3) years inclusive of all activities associated with resources as per the scope of work/deliverables, as well as travel and disbursements costs all the activities associated with resources to render services as follows.

Bidders are required to indicate prices to carry out Employee Health Wellness Services as follows:

1st year	Monthly price excluding VAT	Monthly Price VAT inclusive	Total price/month X 12 months
	R.....	R.....	R.....
2nd year	Monthly price excluding VAT	Monthly Price VAT inclusive	Total price/month X 12 months
	R.....	R.....	R.....
3rd year	Monthly price excluding VAT	Monthly Price VAT inclusive	Total price/month X 12 months
	R.....	R.....	R.....
<u>TOTAL CEILING PRICE (YEAR 1, 2 & 3)</u>		R.....	
Note. Bidders must note that the quoted prices represents a commitment which will be carried through the contract in an event that the bidder is awarded the Bid.			

- 3 NERSA will only accept a **firm ceiling price** for the whole duration of the 3 year contract period in terms of this bid. Non-firm prices will not be considered (prices linked to industry price increase or rates of exchange) and such charges must be discounted into the bid price. The financial proposal should be inclusive of all activities cost's breakdown as per the project scope of work as well as **estimated travel and disbursements costs**.
- 4 Are the rates quoted firm for the full period of the contract (3 years)? **No additional costs will be admitted.** YES/NO
- 5 Are the rates quoted regulated by any professional body (Institutes or Associates)? YES/NO
- 6 The financial proposal/pricing schedule must be submitted separately in a sealed envelope. Failure to complete the pricing schedule will lead to automatic disqualification.