

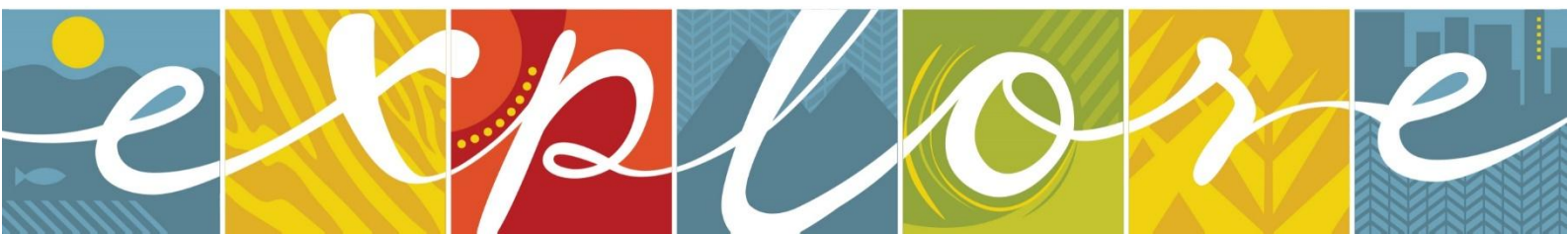
# Eastern Cape

PARKS & TOURISM AGENCY

**BID NO.: RFP 01/26/27**

## THE APPOINTMENT OF A PRIVATE PARTNER TO COMMERCIALISE AND OPERATE THE CAPE MORGAN FACILITY

<b>ADVERTISEMENT DATE:</b>	<b>29 MAY 2026</b>
<b>CLOSING DATE:</b>	<b>28 July 2026 at 11H00AM</b>
<b>ADDRESS:</b>	<b>ECPTA Offices 17-25 Oxford Street, East London</b>
<b>BIDDER NAME:</b>	
<b>CSD NUMBER:</b>	
<b>LEASE AMOUNT PER YEAR</b>	
<b>MINIMUM CAPITAL INVESTMENT</b>	
<b>PROPOSED CONCESSION PERIOD</b>	



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<b>MANDATORY RETURNABLE DOCUMENTS</b>	<b>SUBMITTED [Yes/No]</b>
CENTRALIZED SUPPLIER DATABASE REPORT (FULL CSD REPORT) JULY 2026	
Signed General conditions of contract	
SBD 3.1 (Pricing Schedule)	
Bidders Disclosure (SBD 4)	
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# TENDER NOTICE

BID NO. RFP 01/26/27

Bids are hereby invited for **THE APPOINTMENT OF A PRIVATE PARTNER TO COMMERCIALISE AND OPERATE THE CAPE MORGAN FACILITY**

The Eastern Cape Parks and Tourism Agency (ECPTA), established and mandated in terms of the Eastern Cape Parks and Tourism Agency Act (2 of 2010), is responsible for the management of certain protected areas in the Eastern Cape. In order to achieve its management objectives, the Agency requires the services of an experienced service provider for **THE APPOINTMENT OF A PRIVATE PARTNER TO COMMERCIALISE AND OPERATE THE CAPE MORGAN FACILITY**.

Bid documents outlining detailed specifications will be made available from Tuesday, 02 June 2026 **"FREE OF CHARGE"**. Documents can be downloaded from the ECPTA website: [www.visiteasterncape.co.za/corporate/procurement/tenders](http://www.visiteasterncape.co.za/corporate/procurement/tenders) or Eastern Cape Provincial Treasury: [www.ectreasury.gov.za](http://www.ectreasury.gov.za) or National Treasury e-tender portal [www.etenders.gov.za](http://www.etenders.gov.za)

Completed bid documents accompanied by all necessary documents are to be placed in a sealed envelope with the bid name and number (as given above) clearly written in an envelope. **All bids must be deposited in the Tender Box, at the offices of the Eastern Cape Parks and Tourism Agency at No. 17-25 Oxford Street (Corner of Fleet Street & Oxford Street), by not later than 11h00 on Tuesday, 28 July 2026, at which time the bids will be opened in public.**

*For all enquiries regarding the bid document please contact Ms. Unathi Zinganto at 043 492 0871, e-mail: [Tenders@ecpta.co.za](mailto:Tenders@ecpta.co.za) or Contact Mr. Bulelani Silangwe for technical enquires at 043 492 0868 during working normal hours, email: [Tenders@ecpta.co.za](mailto:Tenders@ecpta.co.za)*



## Evaluation Criteria

A four (4) Stage evaluation process will be employed. In Stage one (1), all bids received will be evaluated on **Compliance Screening**. Only bidders who meet the stage 1 requirements will proceed to Stage two (2) for assessment of **Technical Compliance**. Only bidders meet the technical compliance requirements will proceed to Stage three (3) where bids will be assessed for **Price and Specific Goals** in accordance with the Preferential Procurement Regulations of 2022 utilizing 80/20 or 90/10 preference point system based on the financial return offered. In Stage four (4) bids will be assessed on **Risk Rating and Bankability**.

### Stage 1 – Compliance Screening

- Completed proposal submission
- Company registration documentation
- CSD Registration
- Signed declaration of interest
- Alignment with Concept Acceptability Matrix

### Stage 2 – Technical Compliance

- Strategic Fit and Concept Quality
- Company Profile and Experience
- Financial Sustainability of the Concept

### Stage 3: Price and Specific Goals

Price and specific goals points will be calculated as described in the Preferential Procurement Regulations of 2022. SBD 6.1 form must be used to claim points for specific goals for the company. A copy of CSD report, Medical Certificate and Proof of Address must be submitted as proof of specific goals. When the above documentation is not provided as proof the company will automatically score zero points for specific goals.

**Table 3: Preferential Procurement Points**

Criteria	Points Available	Points available
<b>Bid Price</b>	80	90
<b>Specific Goals</b>	20	10

<b>Total</b>	100	100
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**PART A  
INVITATION TO BID**

**SBD 1**

**YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE EASTERN CAPE PARKS & TOURISM AGENCY**

BID NUMBER:	RFP 01/26/27	CLOSING DATE:	28 JULY 2026	CLOSING TIME:	11:00AM
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DESCRIPTION THE APPOINTMENT OF A PRIVATE PARTNER TO COMMERCIALISE AND OPERATE THE CAPE MORGAN FACILITY

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

17-25 Oxford Street,

Cnr. Oxford and Fleet Street

East London, 5200

<b>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO</b>	<b>TECHNICAL ENQUIRIES MAY BE DIRECTED TO:</b>
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CONTACT PERSON	<b>Ms. U Zinganto</b>	CONTACT PERSON	<b>Mr. B Silangwe</b>
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TELEPHONE NUMBER	<b>043 492 0871</b>	TELEPHONE NUMBER	<b>043 492 0868</b>
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FACSIMILE NUMBER		FACSIMILE NUMBER	
------------------	--	------------------	--

E-MAIL ADDRESS	<a href="mailto:Tenders@ecpta.co.za">Tenders@ecpta.co.za</a>	E-MAIL ADDRESS	<a href="mailto:Tenders@ecpta.co.za">Tenders@ecpta.co.za</a>
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**SUPPLIER INFORMATION**

NAME OF BIDDER

POSTAL ADDRESS

STREET ADDRESS

TELEPHONE NUMBER	CODE	NUMBER
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CELLPHONE NUMBER

FACSIMILE NUMBER	CODE	NUMBER
------------------	------	--------

E-MAIL ADDRESS

VAT REGISTRATION NUMBER

SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:	<b>OR</b>	CENTRAL SUPPLIER DATABASE No:	MAAA
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ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
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**QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS**

IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?  YES  
 NO



DOES THE ENTITY HAVE A BRANCH IN THE RSA?

YES  NO

DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?

YES  NO

DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?

YES  NO

IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?

YES  NO

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



## PART B TERMS AND CONDITIONS FOR BIDDING

### 1. BID SUBMISSION:

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

### 2. TAX COMPLIANCE REQUIREMENTS

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

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

NAME OF THE SIGNATORY .....

SIGNATURE OF THE BIDDER .....

CAPACITY UNDER WHICH THIS BID IS SIGNED: .....

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

DATE: .....



## TERMS OF REFERENCE / SPECIFICATION

### 1. BACKGROUND

The Eastern Cape Parks and Tourism Agency (ECPTA) is a public entity mandated to conserve biodiversity, promote sustainable tourism, and unlock the socio-economic value of provincial tourism assets. As part of this mandate, ECPTA seeks to commercialize the Cape Morgan Conference and Hotel Facility, located within the ecologically sensitive Cape Morgan Nature Reserve, forming part of the broader East London Coast Nature Reserve.

The facility is currently under-utilized and requires an experienced private sector operator to manage, maintain, market and optimize its performance in a manner that balances commercial viability with conservation, heritage protection, and community beneficiation.

Previous open procurement processes, including Requests for Proposals and an Expression of Interest, did not result in the appointment of a compliant and suitable operator. These Terms of Reference therefore incorporate lessons learned from prior processes and are intended to secure a capable, experienced and financially sound operator through a competitive long-term tourism concession structured in accordance with Treasury Regulation 16 principles, in line with National Treasury Regulation 16 and the Public Private Partnership (PPP) Toolkit for Tourism.

### 2. SCOPE OF SERVICE

The purpose of this Terms of Reference is to invite suitably qualified and experienced operators and/or investors to submit proposals for the long-term operation, management and commercialization of the Cape Morgan Conference and Hotel Facility under a Public-Private Partnership model.

#### 2.1. Description of the facility

##### 2.1.1 Location

The Cape Morgan Conference and Hotel Facility is situated approximately 5 km north-east of Kei Mouth and 3 km south-west of Morgan's Bay, within the Cape Morgan Nature Reserve on the Eastern Cape's Wild Coast.

The facility benefits from proximity to established tourism nodes, coastal attractions, hiking trails, beaches, and cultural heritage assets, making it well positioned for leisure, conferencing, retreats and eco-tourism markets.



## 2.1. 2 Facilities Overview

The facility comprises:

### **Accommodation**

- 32 rooms (28 standard rooms and 4 executive rooms, including 1 universally accessible room)
- Reception area and offices
- Launderette and linen rooms
- Rainwater harvesting infrastructure
- Access control and IT systems

### **Conference Centre**

Main conference hall (80–120 delegates)

- Three breakaway rooms
- Offices, storerooms and staff facilities
- Audio-visual and security infrastructure

### **Restaurant and Kitchen**

- Fully fitted commercial kitchen
- Cold and freezer rooms
- Dining area seating approximately 70 guests
- Bar and wooden deck



## 2.2. Objectives of the concession/ PPP

Through this PPP, ECPTA aims to:

- Unlock the commercial potential of the Cape Morgan Conference and Hotel Facility through innovative, sustainable and market-responsive uses;
- Enable revenue generation and long-term financial sustainability for both ECPTA and the private partner;
- Encourage diverse, innovative and adaptive commercial concepts that align with ECPTA's conservation, tourism and socio-economic development mandate;
- Ensure the protection of biodiversity, heritage and the ecological integrity of the Cape Morgan Nature Reserve;
- Promote inclusive economic growth through local employment, enterprise development and skills transfer;
- Transfer appropriate operational, financial and market risks to the private sector while retaining public oversight and accountability.

The PPP is intentionally concept-unbiased, provided that proposed uses are commercially viable, environmentally responsible, socially beneficial, and aligned with ECPTA's legislative mandate and strategic objectives.

## 2.3. Roles and responsibilities of partners

### 2.3.1 Responsibilities of the Private Partner

The appointed private partner will be responsible for:

- Full operational management of the facilities
- Marketing, sales and branding of the facility;
- Staffing, training and human resource management;
- Day-to-day maintenance and asset care;
- Utilities, security, cleaning and waste management;
- Compliance with all environmental, health, safety and labour legislation;
- Payment of agreed Concession fees (rental, revenue share or hybrid model);



- Implementation of approved capital improvements and refurbishments;
- Community development and local procurement initiatives;
- Submission of regular operational and financial reports to ECPTA.

### 2.3.2 Investment Implementation Milestones

The private partner will be required to implement the capital investment commitments outlined in its proposal within agreed timeframes.

As part of the concession agreement, the private partner may be required to submit a detailed development and investment implementation plan outlining:

- the scope of proposed upgrades, refurbishments or developments;
- the estimated capital investment for each component;
- implementation milestones and timelines; and
- reporting arrangements for monitoring progress.

ECPTA reserves the right to incorporate investment milestones and performance obligations into the concession agreement to ensure that committed capital investments are implemented within reasonable timeframes and that the long-term value of the facility is enhanced.

Failure to meet agreed milestones may result in remedial actions or contractual remedies as provided for in the concession agreement.

### 2.3.3 Responsibilities of ECPTA

ECPTA will:

- Grant the operator the right to use and operate the facility for the contract period;
- Retain ownership of the asset;
- Provide oversight and contract management;
- Facilitate access to the site and alignment with reserve operations;
- Monitor compliance with environmental and conservation requirements.



## 2.4. Concession structure and tenure

- The PPP will be structured as a long-term operating concession.
- Ownership of the facility will remain with ECPTA throughout and revert fully upon expiry or termination of the agreement.
- Bidders may propose an appropriate concession period required to support their investment and operational model. However, ECPTA anticipates that the concession term is likely to fall within a range of 15 to 30 years, depending on the level of capital investment proposed.
- ECPTA reserves the right to terminate the agreement. Accordingly, provisions for early termination will be included in the final concession agreement to ensure a fair balance between investor protection and ECPTA's mandate.
- Bidders should take note of the following principles that will guide early termination:

### **a) Circumstances for Early Termination**

The concession agreement will provide for early termination under conditions that may include:

- Material breach of contractual obligations by either party
- Insolvency or financial distress of the concessionaire
- Persistent failure to meet performance or environmental obligations
- Extended force majeure events that render the project unviable
- Termination by ECPTA in the public interest

### **b) General Approach to Termination Consequences**

The final concession agreement is expected to include provisions relating to notice and cure periods, lender step-in rights, asset handover requirements, and a compensation framework aligned to the cause of termination, taking into account the extent of approved capital investment.

## 3. EVOLUTION OF CONCEPT AND FUTURE-PROOFING

### 3.1 Concept Evolution and Adaptability

ECPTA recognizes that market conditions, tourism trends, visitor preferences and commercial opportunities may evolve over the duration of a long-term PPP agreement. Accordingly, the appointed



private partner shall be permitted to refine, adapt or evolve the approved commercial concept over the PPP term, subject to the following conditions:

- Any proposed evolution or modification must remain consistent with ECPTA's mandate, conservation objectives, and the protected-area status of the Cape Morgan Nature Reserve;
- The evolved concept must remain commercially viable, environmentally responsible and socially beneficial;
- No material change may fundamentally alter the approved nature of the PPP without prior written approval from ECPTA;
- Proposed changes may be subject to additional regulatory approvals, environmental authorizations or feasibility assessments, where applicable;
- Concept evolution shall not diminish ECPTA's financial returns, community benefits, or asset integrity.

This provision is intended to future-proof the PPP, encourage innovation and adaptability, and allow the facility to respond to changing market dynamics while maintaining public-interest safeguards.

#### **4. ELIGIBILITY AND MINIMUM REQUIREMENTS**

Interested parties may include operators, investors, developers or consortia proposing innovative commercial uses for the facility. Proposals are not limited to traditional hospitality operations and may include, but are not limited to:

- Conference, events and business tourism operations;
- Eco-tourism, nature-based or experiential tourism concepts;
- Wellness, retreat, education or training-oriented facilities;
- Mixed-use commercial models incorporating accommodation, conferencing, learning or experiential components;
- Other commercially viable uses compatible with a protected area and ECPTA's mandate.

All interested parties must demonstrate:

- A commercially sound and operationally feasible concept;



- Alignment with conservation, environmental sustainability and heritage protection requirements;
- Adequate technical, operational and management capability relevant to the proposed concept;
- Sufficient financial capacity and access to funding;
- Compliance with applicable legislation, including environmental, labour and health & safety laws;
- Commitment to transformation, local economic development and community participation.

## **5. Financial Capacity Requirement**

Bidders must demonstrate adequate financial capacity to support the proposed capital investment and operational requirements of the project.

Evidence of financial capacity may include:

- audited financial statements for the past three years;
- proof of access to funding or financing arrangements;
- letters of support from financial institutions or investors;
- evidence of equity participation by consortium partners; and
- any other documentation demonstrating the bidder's ability to finance the proposed investment.

ECPTA reserves the right to request additional financial information to verify the financial standing and bankability of bidders.

Proposals that fundamentally conflict with ECPTA's conservation, tourism or public-interest mandate will not be considered.

## **6. PROPOSAL SUBMISSION REQUIREMENTS**

Bidders must submit proposals covering the following components. To ensure clarity, comparability and consistency in submissions, bidders are required to structure their proposals in accordance with the sections outlined below.



The proposal should clearly indicate whether the bidder is acting as an operator, investor, developer, or a combination thereof.

## 6.1 Team Composition

Bidders must provide details of the proposed project team and governance arrangements, including:

- Organisational structure or organogram;
- CVs of key personnel demonstrating relevant expertise;
- Management, governance and decision-making arrangements.

The proposed investment will be considered as part of the financial evaluation and value-for-money assessment of proposals.

ECPTA reserves the right to require the preferred bidder to provide appropriate performance guarantees or security to ensure that committed capital investments are implemented within agreed timelines.

The Agency may priorities proposals that demonstrate meaningful capital investment that enhances the long-term value, sustainability and competitiveness of the Cape Morgan facility.

## 7. EVALUATION CRITERIA

A four (4) Stage evaluation process will be employed. In Stage one (1), all bids received will be evaluated on **compliance screening**. Only bidders who meet the stage 1 requirements will proceed to Stage two (2) for assessment of **technical compliance**. Only bidders meet the technical compliance requirements will proceed to Stage three (3) where bids will be assessed for **Price and Specific goals** in accordance with the Preferential Procurement Regulations of 2022 utilizing 80/20 or 90/10 preference point system based on the financial return offered. In Stage four (4) bids will be assessed on **risk rating and bankability**.

Proposals received in response to these Terms of Reference will be evaluated through a structured multi-stage evaluation process aligned with:

- National Treasury Regulation 16 (Public Private Partnerships)



- The PPP Toolkit for Tourism
- ECPTA Supply Chain Management Policy
- Best practice in tourism concession evaluation used by national protected area authorities.

The evaluation process will consist of the following stages:

1. **Stage 1 – Compliance Screening**
2. **Stage 2 – Technical Compliance**
3. **Stage 3 – Price and Specific Goals**
4. **Stage 4 – Risk Rating and Bankability**

Only proposals that successfully pass each stage will proceed to the next stage of evaluation.

### Stage 1 – Compliance Screening

All proposals will first be assessed for compliance with the submission requirements.

Requirement	Outcome
<p>Completed proposal submission</p> <p>Bidders must submit a clear and well-motivated concept proposal that:</p> <ul style="list-style-type: none"> <li>• Describes the proposed use(s) of the facility;</li> <li>• Demonstrates commercial viability and market demand;</li> <li>• Explains how the concept aligns with ECPTA’s conservation, tourism and development mandate;</li> <li>• Identifies target markets and revenue streams;</li> <li>• Demonstrates compatibility with the location within a nature reserve;</li> <li>• Highlights innovation, adaptability and long-term sustainability.</li> </ul>	<p>Pass / Fail</p>



Requirement	Outcome
Company registration documentation <ul style="list-style-type: none"> <li>• Bidders must submit copies of company registration documents. Joint Ventures must submit a Joint Venture Agreement and individual company registration documents.</li> </ul>	Pass / Fail
CSD Registration <ul style="list-style-type: none"> <li>• Bidders must submit copies of a full CSD Report printed in the month of the bid closing date.</li> <li>• Bidders in a Joint Venture must submit their individual full CSD Reports printed in the month of the bid closing</li> </ul>	Pass / Fail
Signed declaration of interest <ul style="list-style-type: none"> <li>• Bidders must fully complete the Declaration of Interest (SBD 4) contained in the bidding documents</li> <li>• Bidders in a Joint Venture must complete individual SBD4 documents</li> </ul>	Pass / Fail
Alignment with Concept Acceptability Matrix <ul style="list-style-type: none"> <li>• Bids will be assessed against the acceptability matrix detailed below.</li> </ul>	Pass / Fail

## 8. CONCEPT ACCEPTABILITY MATRIX

To provide clarity to prospective bidders while preserving flexibility and innovation, ECPTA has developed the following Concept Acceptability Matrix. This matrix is indicative and non-exhaustive and will be used as a guide during evaluation. ECPTA reserves the right to assess all proposals on their individual merits.



## 8.1 Concept Acceptability Matrix

### Category A: Readily Acceptable Concepts

Concepts that clearly align with ECPTA’s tourism, conservation and Commercialization mandate and are generally compatible with protected area operations. Likely acceptable, subject to detailed evaluation

Category	Description	Evaluation Position
Conference, meetings & events facilities	Conferencing, training centers, business tourism, retreats	✓
Eco-tourism & nature-based tourism	Lodges, experiential tourism, guided activities, interpretation centers	✓
Hospitality & accommodation	Hotels, lodges, mixed-use accommodation supporting tourism	✓
Cultural & heritage tourism	Cultural centers, storytelling hubs, heritage interpretation	✓
Wellness & retreat tourism	Wellness retreats, mindfulness, eco-wellness, non-clinical retreats	✓

### Category B: Conditionally Acceptable Concepts

Concepts that may be acceptable subject to additional approvals, impact assessments, or alignment conditions. These concepts will require further due diligence and may be subject to additional regulatory or governance approvals.

Concept Type	Description	Evaluation Position
Education, training & research facilities	Environmental education, leadership academies, training institutes	Conditionally acceptable – subject to approvals



Concept Type	Description	Evaluation Position
Mixed-use commercial models	Blended accommodation, conferencing, learning or experiential uses	Conditionally acceptable – subject to approvals
Wellness or health-adjacent facilities	Preventative wellness, rehabilitation retreats (non-institutional)	Conditionally acceptable – subject to approvals
Creative or innovation hubs	Innovation labs, creative retreats aligned to tourism or conservation	Conditionally acceptable – subject to approvals

**Category C: Non-Permissible Concepts**  
 Concepts fundamentally misaligned with ECPTA’s mandate, protected area regulations, or public-interest objectives. Proposals falling within this category will not be considered.

Concept Type	Description	Evaluation Position
Institutional healthcare facilities	Hospitals, inpatient medical facilities, correctional facilities	Not permissible
Heavy commercial or industrial use	Manufacturing, warehousing, logistics hubs	Not permissible
High-impact or extractive activities	Mining, quarrying, or environmentally destructive uses	Not permissible



Residential-only developments	Permanent residential housing not linked to tourism	Not permissible
Religious/ institutions	Faith-based	Not permissible

Proposals that fail compliance screening will not proceed to technical evaluation.

## 8.2 Stage 2 – Technical Compliance (100 Points)

The technical evaluation assesses the quality, feasibility and alignment of the proposed concept with ECPTA’s strategic objectives.

Minimum qualifying score: **70 out of 100 points.**

Evaluation Category	Scoring Matrix	Maximum Points
<p><b>Strategic Fit and Concept Quality</b></p> <p>The bidder’s proposal must contain the following factors:</p> <ul style="list-style-type: none"> <li>• Alignment with Organizational Strategy</li> <li>• Concept Innovation and Creativity</li> <li>• Feasibility and Practicality</li> <li>• Commercial Viability</li> <li>• Environmental and Social Impact</li> <li>• Quality of Proposal Presentation</li> <li>• Community Development and Transformation</li> </ul> <p><b>NB: The proposal must contain all the above factors in order to be eligible for</b></p>	<ul style="list-style-type: none"> <li>• Alignment with Organizational Strategy = <b>5 points</b></li> <li>• Concept Innovation and Creativity = <b>5 points</b></li> <li>• Feasibility and Practicality= <b>5 points</b></li> <li>• Commercial Viability= <b>5 points</b></li> <li>• Environmental and Social Impact = <b>5 points</b></li> <li>• Quality of Proposal Presentation = <b>5 points</b></li> <li>• Community Development and Transformation = <b>5 points</b></li> </ul>	35



Evaluation Category	Scoring Matrix	Maximum Points
<p><b>scoring. Bidders must clearly align their proposals with the factors listed above.</b></p>	<p><u>Where</u>            5 = Excellent            4 = Good            3 = Satisfactory            2 = Poor            1 = Very Poor            0 = non-responsive</p>	
<p>Operational Capability and Experience</p> <p><b>Company Profile and Experience</b></p> <p>Bidders must provide information on their organisational background and relevant experience, including:</p> <ul style="list-style-type: none"> <li>• Company background and ownership structure.</li> <li>• Relevant operational and project experience related to the proposed concept.</li> <li>• References and a portfolio of similar or comparable projects.</li> </ul> <p><b>NB: Reference letters must be submitted on the letterhead of current or previous clients, or bidders may submit the reference forms attached to the bid document, duly completed by current or previous clients. The reference letters/forms must clearly indicate the</b></p>	<ul style="list-style-type: none"> <li>• 10 years' experience and above = <b>50 points</b></li> <li>• 7-9 years' experience = <b>40 points</b></li> <li>• 4-6 years' experience = <b>30 points</b></li> <li>• 1-3 years' experience = <b>20 points</b></li> <li>• Less than 1 year experience = <b>0</b></li> </ul>	<p>50</p>



Evaluation Category	Scoring Matrix	Maximum Points
description and period of service rendered.		
Financial Sustainability of the Concept	<ul style="list-style-type: none"> <li>• <b>Excellent (11–15):</b> Fully aligns with strategy, highly innovative, feasible, and commercially strong.</li> <li>• <b>Good (6–10):</b> Generally aligned and feasible with minor shortcomings.</li> <li>• <b>Average (3–5):</b> Partially aligned with limited innovation or weak implementation approach.</li> <li>• <b>Poor (0–2):</b> Weak strategic alignment and insufficient concept detail or viability.</li> </ul>	15
<b>Total</b>		<b>100</b>

Only bidders achieving the minimum technical threshold will proceed to the next stage.

### Stage 3: Price and Specific Goals

Price and specific goals points will be calculated as described in the Preferential Procurement Regulations of 2022. SBD 6.1 form must be used to claim points for specific goals for the company. A copy of CSD report, Medical Certificate and Proof of Address must be submitted as proof of specific goals. When the above documentation is not provided as proof the company will automatically score zero points for specific goals.



**Table 3: Preferential Procurement Points**

Criteria	Points Available	Points available
<b>Bid Price</b>	80	90
<b>Specific Goals</b>	20	10
<b>Total</b>	100	100

POINTS FOR SPECIFIC GOALS					
Specific Goals Category	Weighting (of 10 Points)	Number of points	Weighting (of 20 Points)	Number of points	Acceptable Evidence
Locality (Enterprises located in the Eastern Cape Province)	30%	3	35%	7	<u>Valid Proof of Address.</u> Municipal Council Letter <u>Or</u> Lease Agreement/
Enterprises located outside of Eastern Cape		0		0	<u>Or</u> Statement of Account Proof must be valid at the time of submission
>51% Women Ownership	20%	2	25%	5	<u>CSD report</u> <u>Or</u>
10-50% Women Ownership		1		2.5	CIPC certificate & ID Copy
<10% Women Ownership		0		0	
>51% Historically Disadvantaged Individuals Ownership (South African citizen - who, had no franchise in national elections prior to the introduction of the Constitution of the	20%	2	15%	3	<u>CSD report</u> <u>Or</u> CIPC certificate & ID Copy



POINTS FOR SPECIFIC GOALS						
Republic of South Africa, 1983 (Act 110 of 1983) or the Constitution of the Republic of South Africa, 1993, (Act 200 of 1993))						
10-50% HDI Ownership			1			1.5
<10% HDI Ownership			0			0
>51% Youth Ownership	20%		2	15%		3
10-50% Youth Ownership			1			1.5
<10% Youth Ownership			0			0
>51% Disability Ownership	10%		1	10%		2
10-50% Disability Ownership			0,5			1
<10% Women Ownership			0			0
TOTAL	100%		10	100		20

The nature of the bid is revenue generating. Financial proposals that comply with all the bidding conditions and are evaluated on price and specific goals will be assessed accordingly. The financial proposal that offers the highest financial return to the ECPTA will score the maximum points allocated for price (80 or 90 points, as applicable), while the scores of the other bidders will be calculated on a pro-rata basis using the prescribed formula.

### **Guidelines on Financial Proposal (Price)**

Bidders must submit a detailed financial proposal that entails the following

- i. Financial return to ECPTA (lease and revenue share)
- ii. Minimum Capital Investment Commitment



Bidders are required to indicate the level of capital investment they propose to commit towards the refurbishment, upgrading, enhancement or development of the Cape Morgan facility. The proposed investment must include:

- a. The total capital investment amount.
  - b. A description of the planned upgrades, refurbishments or improvements to the facility.
  - c. The timeline for implementation of the proposed investment; and
  - d. The sources of funding for the proposed capital investment
- iii. Bidders must submit a financial proposal that clearly outlines the proposed commercial structure for the concession. The financial proposal should include:
- a. The proposed concession financial model
  - b. Proposed revenue-sharing or rental structure payable to ECPTA;
  - c. Financial sustainability projections and key assumptions supporting the proposed concept.
- iv. Normalized Financial Value Assessment

Where bidders propose different concession periods, ECPTA may apply a normalized financial value assessment to enable fair comparison of financial offers. This approach evaluates the total financial value of the proposal to ECPTA over the proposed concession period, taking into account:

- a. proposed lease and revenue-sharing payments;
  - b. proposed capital investment commitments;
  - c. the duration of the proposed concession term; and
  - d. the overall long-term financial value to ECPTA.
- v. Where necessary, ECPTA may normalize financial offers on an annualized or net present value basis to ensure that proposals requesting longer concession periods are assessed fairly against proposals with shorter concession terms.
- vi. This assessment will support the value-for-money determination and the recommendation of the preferred bidder.

#### **Stage :4 Risk Rating and Bankability**

In addition to the evaluation scoring, ECPTA may conduct a Bidder Risk Rating and Bankability Assessment to determine the financial and operational credibility of shortlisted bidders.



This assessment ensures that the preferred bidder is capable of delivering and sustaining the proposed concession over the duration of the Concession Agreement.

### Bidder Risk Rating Matrix and Bankability

Risk Category	Risk Indicators	Risk Rating
Financial Capacity	Strength of balance sheet and access to capital	Low / Medium / High
Funding Certainty	Confirmed funding sources and financial backing	Low / Medium / High
Operational Capability	Demonstrated experience in hospitality or tourism operations	Low / Medium / High
Delivery Risk	Ability to implement required upgrades or investments	Low / Medium / High
Environmental Compliance Risk	Environmental management and compliance record	Low / Medium / High
Reputational Risk	Governance record and litigation history	Low / Medium / High
Community Impact Risk	Ability to deliver local economic development commitments	Low / Medium / High

### Bankability Assessment Matrix

Bankability Factor	Assessment Focus
Capital Investment Feasibility	Ability to finance proposed investments
Financial Model Credibility	Realistic financial projections
Revenue Sustainability	Market demand and long-term revenue potential



Risk Allocation	Appropriate transfer of operational and financial risks
Debt Service Capacity	Ability to service debt obligations
Investment Return	Reasonable return for private partner

The outcome of this assessment may be used to inform the preferred bidder recommendation, particularly where competing proposals achieve similar evaluation scores.

ECPTA reserves the right to invite shortlisted bidders to present or clarify aspects of their proposals prior to final evaluation.

### Evaluation of Proposed Concession Term

Bidders may propose an appropriate concession period required to support their proposed capital investment and operational model.

While ECPTA anticipates that the concession term is likely to fall within a range of 15 to 30 years, bidders may propose alternative durations where justified by the scale of investment and commercial model.

In evaluating proposed concession periods, ECPTA will consider whether the requested term is reasonable and proportionate to the level of investment and financial return offered to ECPTA.

The objective of this assessment is to ensure that the concession structure provides fair value to ECPTA while allowing sufficient time for the private partner to recover its **investment and** operate sustainably.

### Concession Term Evaluation Criteria

Evaluation Factor	Considerations
Level of capital investment	Whether the proposed concession period is justified by the level of investment



Financial return to ECPTA	Lease payments, revenue share or hybrid financial model
Payback period	Whether the concession term reasonably reflects investment recovery
Long-term value to ECPTA	Overall economic benefit over the duration of the concession

ECPTA reserves the right to negotiate the final concession term with the preferred bidder during the contract finalisation stage.

**BIDDERS SHALL TAKE NOTE OF THE FOLLOWING BID CONDITIONS:**

- The Eastern Cape Parks & Tourism Agency Supply Chain Management Policy will apply
- Bidders must be registered with the National Treasury Central Supplier Database (CSD) and submit a full copy of CSD report for the month of bid closing.
- Eastern Cape Parks & Tourism Agency does not bind itself to accept the highest bid or any other bid and reserves the right to accept the whole or part of the bid.
- The ECPTA reserves the right to request any additional information for the purpose of evaluation and adjudication of this bid. Such requests shall be made solely for the discretion of ECPTA
- Bids which are late, incomplete, unsigned, or submitted by facsimile or electronically, will not be accepted.
- Bids submitted are to hold good for a period of 150 days.
- Companies that bid as joint venture must submit an official signed business agreement by both parties. If the service provider does not meet this requirement, it will be automatically disqualified.
- The ECPTA Bid Committee and the Supply Chain Management Unit may, before a bid is adjudicated or at any time during the bidding process, oblige a bidder to substantiate any claims it may have made in its bid documents.



- No bids will be considered if the bidder did not fully complete and sign all the relevant pages in the bid document. If the bidder does not meet this requirement, it will be automatically disqualified.
- The ECPTA reserves the right to request any additional information for the purpose of evaluation and adjudication of this bid. Such requests shall be made solely for the discretion of the ECPTA.



## GENERAL CONDITIONS OF THE BID

### 1. Interpretation

The word "Bidder" in these conditions shall mean and include any firm or any company or body incorporated or unincorporated.

The word "ECPTA" in these conditions shall mean the Eastern Cape Parks & Tourism Agency.

### 2. Extent of the bid

This contract is for the provision of the services as detailed in the attached Specification (page 9 - 16).

### 3. Contract to be Binding

The formal acceptance of the Purchase Order by the ECPTA will constitute a contract binding on both parties. A service level Agreement will be signed by both parties

### 4. Mode of the Bid

All Bids shall be completed and signed: All forms, annexure, addendums and specifications shall be signed and returned with the Bid document as a whole. ***The lowest or any Bid will not necessarily be accepted.*** The ECPTA wishes to deal on a prime contractual basis with the successful Bidder being responsible and accountable for all aspects of the entire solution or service offered.

### 5. Quality

Should the specifications and / or descriptions not address any aspects of quality as specified, clarity should be provided to the ECPTA prior to the submission of a quotation.

### 6. Insurance Claims, etc.

The ECPTA shall not be liable in any manner in respect of any claims, damages, accidents and injuries to persons, property or rights or any other courses of civil or criminal action that may arise from the carrying out of this contract.

The company shall insure his / her / their personnel and any plant, machinery or other mechanical or electronic equipment involved in the fulfillment of this contract and shall indemnify the ECPTA against



all risks or claims which may arise. It will be required from the successful Bidder to submit proof of insurance or any other valid form of indemnification to ECPTA for scrutiny.

## **7. Signing of Documents**

Bidders are required to return the complete set of documents duly signed.

## **8. Period of Validity for Bids and withdrawal of Bid after Closing Date**

All bids must remain valid for a period of 150 (one- hundred and fifty) days from the closing date as stipulated in the Bid document.

### **8.1 Penalty Provision**

Should the successful Bidder:

- a. Withdraw the Bid during the afore-mentioned period of validity; or
- b. Advise the ECPTA of his / her / their inability to fulfill the contract; or
- c. Fail or refuse to fulfill the contract; or
- d. Fail or refuse to sign the agreement or provide any surety if required to do so;

Then, the Bidder will be held responsible for and is obligated to pay to the ECPTA:

All expenses incurred by the ECPTA to advertise for or invite and deliberate upon new Bids, should this be necessary.

The difference between the original accepted Bid price and:

- (i) A less favorable (for the ECPTA) Bid price accepted as an alternative by the ECPTA from the Bids originally submitted; or
- (ii) A new Bid price.

## **9. Value Added Tax**

In calculating the cost of the supply and delivery of services and / or material, the supplier will issue a "Tax Invoice" for all services rendered and / or materials supplied, which will reflect the exclusive cost of such services, goods or materials with the relevant Value Added Tax being added to the total. VAT must be included in the Bid price but must be shown separately.

## **10. Price Escalation:**

To be provided on the pricing schedule over the duration of the contract.



#### **11. Authority to Sign Bid Documents**

In the case of a Bid being submitted on behalf of a company, close corporation or partnership, evidence must be submitted to the ECPTA at the time of submission of the Bid that the Bid has been signed by persons properly authorized thereto by resolution of the directors or under the articles of the entity.

**12. Samples:** N/A

#### **13. Duration of the Bid:**

The contract period proposed by the bidder will be evaluated and adjudicated by the ECPTA and negotiated with the bidder.

#### **14. Delivery Periods:**

The successful bidder will liaise with Mr. Bulelani Silangwe – 043 492 0869

#### **15. Closing Date / Submitting of Quotations**

Bids must be submitted in sealed envelopes clearly marked **“THE APPOINTMENT OF A PRIVATE PARTNER TO COMMERCIALISE AND OPERATE THE CAPE MORGAN FACILITY.” - BID NO. P “RFP 01/26/27”** Proposals must be deposited in the Bid Box, 17-25 Oxford Street (Cnr of Fleet & Oxford Street), East London, by no later than **11:00 am** on the **28 July 2026**.

***Bids which are not submitted in a properly sealed and marked envelope and/or deposited in the relevant bid box on or before the closing date and time will not be considered. Faxed or e-mailed Bids will not be considered.***

#### **Bid Enquiries**

Enquiries should be directed to the Supply Chain Management Unit. The following official can be contacted: Mr. Unathi Zinganto 043 492 0871 during normal office hours viz. 08:00 – 16:00 Mondays to Fridays-mail: [Tenders@ecpta.co.za](mailto:Tenders@ecpta.co.za)



## **16. Insurance and Indemnity**

ECPTA shall not be liable in any manner in respect of any claims, damages, accidents and injuries to persons, property or rights or any other courses of civil or criminal action that may arise from the carrying out of this contract.

## **17. Validity Period**

Proposals are to be held valid and binding for 150 days from the closing date of submissions (calculated from, but not including, the due date).

### *a. Payment*

Payment will be made on completion of Supply and Delivery within 30 days of receipt of the invoice.

### *b. Control of The Contract*

For the purposes of this contract ECPTA has appointed the Bid Committee for the adjudication, award and management of the bid.

### *c. Agreement*

The successful bidder undertakes to be bound by all terms and conditions contained in this bid document. The successful bidder will be awarded a Purchase Order which serves as the binding contract with ECPTA.



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## GENERAL CONDITIONS OF CONTRACT

### 1. Definitions

The following terms shall be interpreted as indicated:

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



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



provision of technical assistance, training, catering, gardening, security, maintenance and other such obligations of the provider covered under the contract.

- 1.28 **“Signature date “** means the date of the letter of acceptance;
- 1.29 **“Tender”** means an offer to supply goods/services to ECPTA at a price;
- 1.30 **“Tenderer”** means any person or body corporate offering to supply goods/services to ECPTA;
- 1.31 **“Written” or “in writing”** means hand-written in ink or any form of electronic or mechanical writing.

## **2. Application**

- 2.1 These general conditions are applicable to all bids, contracts and orders including bids for functional and professional services (excluding professional services related to the building and construction industry), sales, hiring, letting and the granting or acquiring of rights, but excluding immovable property, unless otherwise in the bidding documents.
- 2.2 Where applicable, special conditions of contract are also laid down to cover specific supplies, services or works.
- 2.3 Where such special conditions of contract are in conflict with these general conditions, the special conditions shall apply.

## **3. General**

- 3.1 Unless otherwise indicated in the bidding documents, ECPTA shall not be liable for any expense incurred in the preparation and submission of a bid. Where applicable a non-refundable fee for documents may be charged.
- 3.2 Invitations to bid are usually published in locally distributed news media and on the Eastern Cape Treasury government tender bulletin.

## **4. Standards**

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

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

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



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

## **6. Patent rights**

- 6.2 The provider shall indemnify the purchaser against all third-party claims of infringement of patent, trademark, or industrial design rights arising from use of goods or any part thereof by the purchaser.
- 6.3 When a provider develops documentation/projects for ECPTA, the intellectual, copy and patent rights or ownership of such documents or projects will vest in ECPTA.

## **7. Performance security**

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

## **8. Inspections, tests and analyses**

- 8.1 All pre-bidding testing will be for the account of the bidder.



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

## 9. Packaging

- 9.1 The provider shall provide such packaging of the goods as is required to prevent their damage or deterioration during transit to their final destination, as indicated in the contract. The packaging shall be sufficient to withstand, without limitation, rough handling during transit and exposure to extreme temperatures, salt and precipitation during transit, and open storage. Packaging, case size and weights shall take into consideration, where appropriate, the remoteness of the good's final destination and the absence of heavy handling facilities at all points in transit.
- 9.2 The packaging, marking and documentation within and outside the packages shall comply strictly with such special requirements as shall be expressly provided for in the contract,



including additional requirements, if any, and in any subsequent instructions ordered by the purchaser.

## **10. Delivery and documents**

10.1 Delivery of the goods and arrangements for shipping and clearance obligations shall be made by the provider in accordance with the terms specified in the contract.

## **11. Insurance**

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

## **12. Transportation**

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

## **13. Incidental services**

13.1 The provider may be required to provide any or all of the following services, including additional services, if any:

- (a) performance or supervision of on-site assembly and/or commissioning of the supplied goods;
- (b) furnishing of tools required for assembly and/or maintenance of the supplied goods;
- (c) furnishing of a detailed operations and maintenance manual for each appropriate unit of the supplied goods;
- (d) performance or supervision or maintenance and/or repair of the supplied goods, for a period of time agreed by the parties, provided that this service shall not relieve the provider of any warranty obligations under this contract; and
- (e) training of the purchaser's personnel, at the provider's plant and/or on-site, in assembly, start-up, operation, maintenance, and/or repair of the supplied goods.

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

## **14. Spare parts**

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

- (a) such spare parts as the purchaser may elect to purchase from the provider, provided that this election shall not relieve the provider of any warranty obligations under the contract, and
- (b) in the event of termination of production of the spare parts:



- (i) Advance notification to the purchaser of the pending termination, in sufficient time to permit the purchaser to procure needed requirements; and
- (ii) Following such termination, furnishing at no cost to the purchaser, the blueprints, drawings, and specifications of the spare parts, if requested.

## **15. Warranty**

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

## **16. Payment**

- 16.1 The method and conditions of payment to be made to the provider under this contract shall be specified
- 16.2 The provider shall furnish the purchaser with an invoice accompanied by a copy of the delivery note and upon fulfilment of other obligations stipulated in the contract.
- 16.3 Payments shall be made promptly by the purchaser, but in no case later than thirty (30) days after submission of an invoice or claim by the provider.
- 16.4 Payment will be made in Rand unless otherwise stipulated.

## **17. Prices**

- 17.1 Prices charged by the provider for goods delivered and services performed under the contract shall not vary from the prices quoted by the provider in his bid, with the exception of any price



adjustments authorized or in the purchaser's request for bid validity extension, as the case may be.

## **18. Increase/decrease of quantities**

- 18.1 In cases where the estimated value of the envisaged changes in purchase does not exceed 15% of the total value of the original contract, the contractor may be instructed to deliver the revised quantities. The contractor may be approached to reduce the unit price, and such offers may be accepted provided that there is no escalation in price.

## **19. Contract amendments**

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

## **20. Assignment**

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

## **21. Subcontracts**

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

## **22. Delays in the provider's performance**

- 22.1 Delivery of the goods and performance of services shall be made by the provider in accordance with the time schedule prescribed by the purchaser in the contract.
- 22.2 If at any time during performance of the contract, the provider or its subcontractor(s) should encounter conditions impeding timely delivery of the goods and performance of services, the provider shall promptly notify the purchaser in writing of the fact of the delay, its likely duration and its cause(s). As soon as practicable after receipt of the provider's notice, the purchaser shall evaluate the situation and may at his discretion extend the provider's time for performance, with or without the imposition of penalties, in which case the extension shall be ratified by the parties by amendment of contract.
- 22.3 The right is reserved to procure outside of the contract small quantities or to have minor essential services executed if any emergency arises, the provider's point of supply is not situated at or near the place where the supplies are required, or the provider's services are not readily available.
- 22.4 Except as provided under GCC Clause 25, a delay by the provider in the performance of its delivery obligations shall render the provider liable to the imposition of penalties, pursuant to GCC Clause 22, unless an extension of time is agreed upon pursuant to GCC Clause 21.2 without the application of penalties.



22.5 Upon any delay beyond the delivery period in the case of a supplies contract, the purchaser shall, without canceling the contract, be entitled to purchase supplies of a similar quality and up to the same quantity in substitution of the goods not supplied in conformity with the contract and to return any goods delivered later at the provider's expense and risk, or to cancel the contract and buy such goods as may be required to complete the contract and without prejudice to his other rights, be entitled to claim damages from the provider.

### **23. Penalties**

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

### **24. Termination For Default**

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

- (a) if the provider fails to deliver any or all of the goods within the period(s) specified in the contract, or within any extension thereof granted by the purchaser pursuant to GCC Clause 21.2;
- (b) if the provider fails to perform any other obligation(s) under the contract; or
- (c) if the provider, in the judgement of the purchaser, has engaged in corrupt or fraudulent practices in competing for or in executing the contract.

24.2 In the event the purchaser terminates the contract in whole or in part, the purchaser may procure, upon such terms and in such manner as it deems appropriate, goods, works or services similar to those undelivered, and the provider shall be liable to the purchaser for any excess costs for such similar goods, works or services. However, the provider shall continue performance of the contract to the extent not terminated.

### **25. Anti-Dumping and Countervailing Duties and Rights**

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



## **26. Force Majeure**

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

## **27. Termination For Insolvency**

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

## **28. Settlement of Disputes**

- 28.1 If any dispute or difference of any kind whatsoever arises between the purchaser and the provider in connection with or arising out of the contract, the parties shall make every effort to resolve amicably such dispute or difference by mutual consultation.
- 28.2 If, after thirty (30) days, the parties have failed to resolve their dispute or difference by such mutual consultation, then either the purchaser or the provider may give notice to the other party of his intention to commence with mediation. No mediation in respect of this matter may be commenced unless such notice is given to the other party.
- 28.3 Should it not be possible to settle a dispute by means of mediation, it may be settled in a South African court of law.
- 28.4 Notwithstanding any reference to mediation and / or court proceedings herein,
- (a) the parties shall continue to perform their respective obligations under the contract unless they otherwise agree; and
  - (b) the purchaser shall pay the provider any monies due to the provider for goods delivered and / or services rendered according to the prescripts of the contract.



## **29. Limitation of Liability**

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

## **30. Governing Language**

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

## **31. Applicable Law**

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

## **32. Notices**

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

## **33. Taxes and Duties**

- 33.1 A foreign provider shall be entirely responsible for all taxes, stamp duties, license fees, and other such levies imposed outside the purchaser's country.
- 33.2 A local provider shall be entirely responsible for all taxes, duties, license fees, etc, incurred until delivery of the contracted goods to the purchaser.
- 33.3 No contract shall be concluded with any bidder whose tax matters are not in order. Prior to the award of a bid SARS must have certified that the tax matters of the preferred bidder are in order.

## **34. Transfer of Contracts**

- 34.1 The contractor shall not abandon, transfer, assign or sublet a contract or part thereof without the written permission of the purchaser.



### 35. Amendment of Contracts

35.1 No agreement to amend or vary a contract or order or the conditions, stipulations or provisions thereof shall be valid and of any force 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.

### 36. National Industrial Participation Programme (NIPP)

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

### 37. Amendment of Contracts

37.1 In terms of Section 4 (b) (iii) of the Competition Act No. 89 of 1998, as amended, an agreement between, or concerted practice by, firms, or a decision by an association of firms, is prohibited if it is between parties in a horizontal relationship and if a bidder(s) is/are or a contractor (s) was / were involved in collusive bidding (or bid rigging).

37.2 If a bidder (s) or contractors, based on reasonable grounds or evidence obtained by purchaser, has / have engaged in the restrictive practice referred above, the purchaser may refer the matter to the Competition Commission for investigation and possible imposition of administrative penalties as contemplated in the Competition Act No. 89 of 1998.

37.3 If a bidder (s) or contractor (s), has / have been found guilty by the Competition Commission of the restrictive practice referred to above, the purchaser may, in addition and without prejudice to any other remedy provided for, invalidate the bidder (s) for such item (s) offered and / terminate the contract in whole or part, and / or restrict the bidder (s) or contract (s) from conducting business with the public sector for a period not exceeding ten (10) years and / or claim damages from the bidder (s) or contractor(s) concerned.

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**DATE**

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**SIGNATURE OF BIDDER**



## CENTRALISED SUPPLIER DATABASE (CSD) REPORT

It is a condition of bid that all Service Providers be registered on the Centralised Supplier Database (CSD). Bidders who are not yet registered can register on [www.csd.gov.za](http://www.csd.gov.za)

1. In order to meet this requirement bidders are required to complete the Registration Process which can be done online at the above-mentioned website. Upon completion of registration Bidders will receive a Supplier number which must be provided on the front cover of the document
2. BIDDERS are required to submit their full CSD report for the month of July 2026.



ATTACH CSD REPORT HERE



**NOTE: ONLY FIRM PRICES WILL BE ACCEPTED. NON-FIRM PRICES (INCLUDING PRICES SUBJECT TO RATES OF EXCHANGE VARIATIONS) WILL NOT BE CONSIDERED**

**NAME OF THE BIDDER:** .....

BID NO.: RFP 01/26/27

DESCRIPTION: THE APPOINTMENT OF A PRIVATE PARTNER TO COMMERCIALISE AND OPERATE THE CAPE MORGAN FACILITY

CLOSING TIME 11:00 CLOSING DATE: 28 JULY 2026

OFFER TO BE VALID FOR 150 DAYS FROM THE CLOSING DATE OF BID.

Bidders must submit their detailed financial proposals here. The financial proposal must be aligned with the Terms of Reference.



## 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 interest in the enterprise, employed by the state?

**YES/NO**

2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of State institution

2.1.2 If the bidder or any of its directors/trustees/shareholders/members/partners or any person having a controlling interest in the enterprise are employed by the state, is there any approval to conduct business with the state, signed by the accounting officer/authority attached?

**YES/NO or N/A**



**Please attach letter of approval signed by the Accounting Officer/ Accounting Authority.**

**Failure to submit proof of approval from the Accounting Officer/ Accounting Authority will lead to immediate rejection of the bid/quotation.**

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 consortium<sup>1</sup> 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.

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<sup>1</sup> 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.



- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

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

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

..... Signature	..... Date
..... Position	..... Name of bidder



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

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

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

### 1. GENERAL CONDITIONS

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

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

### 1.2 To be completed by the organ of state

*(delete whichever is not applicable for this tender).*

- a) The applicable preference point system for this tender is the 90/10 preference point system.
- b) The applicable preference point system for this tender is the 80/20 preference point system.
- c) Either the 90/10 or 80/20 preference point system will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

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

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

### 1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS (80/20)	Points (90/10)
PRICE	80	90



<b>SPECIFIC GOALS</b>	<b>20</b>	<b>10</b>
<b>Total points for Price and SPECIFIC GOALS</b>	<b>100</b>	<b>100</b>

- 1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.
- 1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

## 2. DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

## 3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

### 3.1. POINTS AWARDED FOR PRICE

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

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

$$P_s = 80 \left( 1 - \frac{P_t - P_{min}}{P_{min}} \right) \text{ or } P_s = 90 \left( 1 - \frac{P_t - P_{min}}{P_{min}} \right)$$



Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

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

#### 3.2.1. POINTS AWARDED FOR PRICE

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

$$Ps = 80 \left( 1 + \frac{Pt - Pmax}{Pmax} \right) \text{ or } Ps = 90 \left( 1 + \frac{Pt - Pmax}{Pmax} \right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmax = Price of highest acceptable tender

## 4. POINTS AWARDED FOR SPECIFIC GOALS

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

4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—

(a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or

(b) any other invitation for tender, that either the 80/20 or 90/10 preference point



system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system, then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

**Table 1: Specific goals for the tender and points claimed are indicated per the table below.**

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the organ of state)	(To be completed by the tenderer)
Locality (Enterprises located in the Eastern Cape Province)	7	3	
>51% Women Ownership	5	2	
10-50% Women Ownership	2.5	1	
<10% Women Ownership	0	0	
>51% Historically Disadvantaged Individuals Ownership	3	2	
(South African citizen - who, had no franchise in national elections prior to the introduction of the Constitution of the Republic of South Africa, 1983 (Act 110 of 1983) or the Constitution of the Republic of South Africa, 1993, (Act 200 of 1993))			
10-50% HDI Ownership	1.5	1	
<10% HDI Ownership	0	0	
>51% Youth Ownership	3	2	
10-50% Youth Ownership	1.5	1	
<10% Youth Ownership	0	0	
>51% Disability Ownership	2	1	
10-50% Disability Ownership	1	0,5	
<10% Women Ownership	0	0	
<b>Total</b>	20	10	



**DECLARATION WITH REGARD TO COMPANY/FIRM**

4.3. Name of company/firm.....

4.4. Company registration number: .....

4.5. TYPE OF COMPANY/ FIRM

- Partnership/Joint Venture / Consortium
- One-person business/sole propriety
- Close corporation
- Public Company
- Personal Liability Company
- (Pty) Limited
- Non-Profit Company
- State Owned Company

[TICK APPLICABLE BOX]

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
  - (a) disqualify the person from the tendering process;
  - (b) recover costs, losses or damages it has incurred or suffered as a result of that person’s conduct;
  - (c) cancel the contract and claim any damages which it has suffered as a



result of having to make less favourable arrangements due to such cancellation;

- (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
- (e) forward the matter for criminal prosecution, if deemed necessary.

.....	
<b>SIGNATURE(S) OF TENDERER(S)</b>	
<b>SURNAME AND NAME:</b>	.....
<b>DATE:</b>	.....
<b>ADDRESS:</b>	.....
	.....



## Evaluation Criteria

A four (4) Stage evaluation process will be employed. In Stage one (1), all bids received will be evaluated on **Compliance Screening**. Only bidders who meet the stage 1 requirements will proceed to Stage two (2) for assessment of **Technical Compliance**. Only bidders meet the technical compliance requirements will proceed to Stage three (3) where bids will be assessed for **Price and Specific goals** in accordance with the Preferential Procurement Regulations of 2022 utilizing 80/20 or 90/10 preference point system based on the financial return offered. In Stage four (4) bids will be assessed on **Risk Rating and Bankability**.



ATTACH COMPLETED PROPOSAL



ATTACH COMPANY PROFILE AND EXPERIENCE



**This form must be completed by the authorized person of the bidder's current or previous clients. The form must be fully completed, signed, and stamped. Forms which are neither complete, nor signed nor stamped will not be considered for evaluation.**

**1. REFERENCE FOR THE BIDDER**

<b>Name of Institution (Client)</b>	
<b>Contract/Tender Number</b>	
<b>Contract Description</b>	
<b>Name of Service Provider (Bidder)</b>	
<b>Value of project</b>	
<b>Commencement Date</b>	
<b>Contractual Completion Date</b>	
<b>Bidder's Completion Date</b>	

**1.1 Please score the performance of the above-mentioned company by marking the relevant box**

<b>Performance Rating</b>			<b>Comments</b>
Work performed in compliance with contract terms.	Excellent	5	
	Good	4	
	Fair	3	
	Poor	2	
	Very Poor	1	
Financial Status of the bidder in relation to the work to be performed.	Excellent	5	
	Good	4	
	Fair	3	
	Poor	2	
	Very Poor	1	
Timelines of work are met.	Excellent	5	
	Good	4	



	Fair	3	
	Poor	2	
	Very Poor	1	
Customer services.	Excellent	5	
	Good	4	
	Fair	3	
	Poor	2	
	Very Poor	1	
Quality of Service.	Excellent	5	
	Good	4	
	Fair	3	
	Poor	2	
	Very Poor	1	
Communication and accessibility.	Excellent	5	
	Good	4	
	Fair	3	
	Poor	2	
	Very Poor	1	
Documentation records, receipts, invoices and computer-generated reports received in a timely manner and in compliance with contract specification	Excellent	5	
	Good	4	
	Fair	3	
	Poor	2	
	Very Poor	1	
Would you recommend using this service provider in future?	Yes	No	If no, provide reasons:



**OVERALL PERFORMANCE**

Excellent		Good		Fair		Poor		Very Poor	
-----------	--	------	--	------	--	------	--	-----------	--

Name of Authorized Person \_\_\_\_\_

Designation \_\_\_\_\_

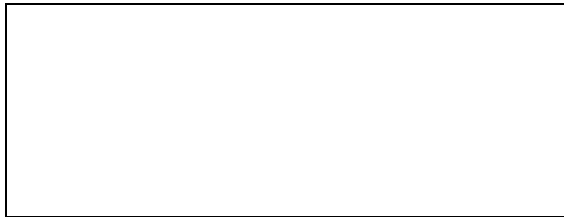
Email Address \_\_\_\_\_

Contact number \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

**Official Stamp**



## 2. REFERENCE FOR THE BIDDER

<b>Name of Institution (Client)</b>	
<b>Contract/Tender Number</b>	
<b>Contract Description</b>	
<b>Name of Service Provider (Bidder)</b>	
<b>Value of project</b>	
<b>Commencement Date</b>	
<b>Contractual Completion Date</b>	
<b>Bidder's Completion Date</b>	

**1.1 Please score the performance of the above-mentioned company by marking the relevant box**

Performance Rating			Comments
Work performed in compliance with contract terms.	Excellent	5	
	Good	4	
	Fair	3	
	Poor	2	
	Very Poor	1	
Financial Status of the bidder in relation to the work to be performed.	Excellent	5	
	Good	4	
	Fair	3	
	Poor	2	
	Very Poor	1	
Timelines of work are met.	Excellent	5	
	Good	4	
	Fair	3	
	Poor	2	
	Very Poor	1	
Customer services.	Excellent	5	



	Good	4	
	Fair	3	
	Poor	2	
	Very Poor	1	
Quality of Service.	Excellent	5	
	Good	4	
	Fair	3	
	Poor	2	
	Very Poor	1	
Communication and accessibility.	Excellent	5	
	Good	4	
	Fair	3	
	Poor	2	
	Very Poor	1	
Documentation records, receipts, invoices and computer-generated reports received in a timely manner and in compliance with contract specification	Excellent	5	
	Good	4	
	Fair	3	
	Poor	2	
	Very Poor	1	
Would you recommend using this service provider in future?	Yes		If no, provide reasons:
	No		

**OVERALL PERFORMANCE**

Excellent		Good		Fair		Poor		Very Poor	
-----------	--	------	--	------	--	------	--	-----------	--

Name of Authorized Person \_\_\_\_\_

Designation \_\_\_\_\_

Email Address \_\_\_\_\_

Contact number \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

**Official Stamp**



### 3. REFERENCE FOR THE BIDDER

<b>Name of Institution (Client)</b>	
<b>Contract/Tender Number</b>	
<b>Contract Description</b>	
<b>Name of Service Provider (Bidder)</b>	
<b>Value of project</b>	
<b>Commencement Date</b>	
<b>Contractual Completion Date</b>	
<b>Bidder's Completion Date</b>	

**1.1 Please score the performance of the above-mentioned company by marking the relevant box**

Performance Rating			Comments
Work performed in compliance with contract terms.	Excellent	5	
	Good	4	
	Fair	3	
	Poor	2	
	Very Poor	1	
Financial Status of the bidder in relation to the work to be performed.	Excellent	5	
	Good	4	
	Fair	3	
	Poor	2	
	Very Poor	1	
Timelines of work are met.	Excellent	5	
	Good	4	
	Fair	3	
	Poor	2	
	Very Poor	1	



Customer services.	Excellent	5	
	Good	4	
	Fair	3	
	Poor	2	
	Very Poor	1	
Quality of Service.	Excellent	5	
	Good	4	
	Fair	3	
	Poor	2	
	Very Poor	1	
Communication and accessibility.	Excellent	5	
	Good	4	
	Fair	3	
	Poor	2	
	Very Poor	1	
Documentation records, receipts, invoices and computer-generated reports received in a timely manner and in compliance with contract specification	Excellent	5	
	Good	4	
	Fair	3	
	Poor	2	
	Very Poor	1	
Would you recommend using this service provider in future?	Yes	No	If no, provide reasons:

**OVERALL PERFORMANCE**

Excellent		Good		Fair		Poor		Very Poor	
-----------	--	------	--	------	--	------	--	-----------	--

Name of Authorized Person \_\_\_\_\_

Designation \_\_\_\_\_

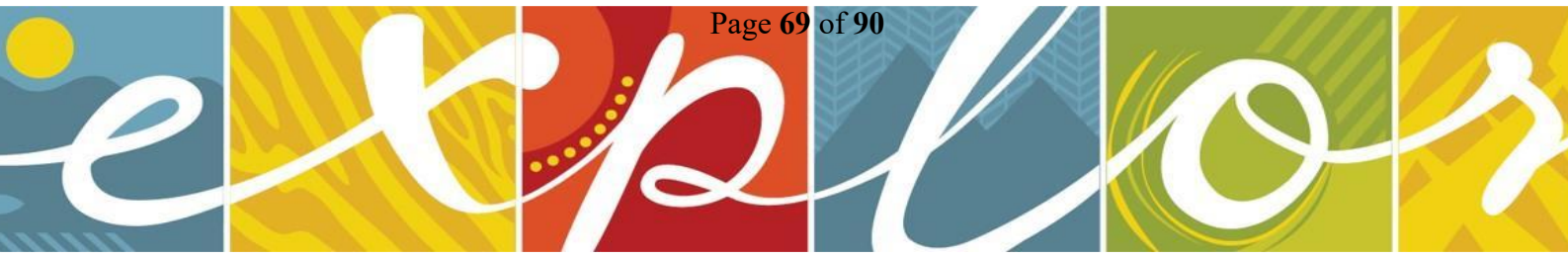
Email Address \_\_\_\_\_

Contact number \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

**Official Stamp**



**4.REFERENCE FOR THE BIDDER**

<b>Name of Institution (Client)</b>	
<b>Contract/Tender Number</b>	
<b>Contract Description</b>	
<b>Name of Service Provider (Bidder)</b>	
<b>Value of project</b>	
<b>Commencement Date</b>	
<b>Contractual Completion Date</b>	
<b>Bidder's Completion Date</b>	

**1.1 Please score the performance of the above-mentioned company by marking the relevant box**

<b>Performance Rating</b>			<b>Comments</b>
Work performed in compliance with contract terms.	Excellent	5	
	Good	4	
	Fair	3	
	Poor	2	
	Very Poor	1	
Financial Status of the bidder in relation to the work to be performed.	Excellent	5	
	Good	4	
	Fair	3	
	Poor	2	
	Very Poor	1	
Timelines of work are met.	Excellent	5	
	Good	4	
	Fair	3	
	Poor	2	
	Very Poor	1	



Customer services.	Excellent	5	
	Good	4	
	Fair	3	
	Poor	2	
	Very Poor	1	
Quality of Service.	Excellent	5	
	Good	4	
	Fair	3	
	Poor	2	
	Very Poor	1	
Communication and accessibility.	Excellent	5	
	Good	4	
	Fair	3	
	Poor	2	
	Very Poor	1	
Documentation records, receipts, invoices and computer-generated reports received in a timely manner and in compliance with contract specification	Excellent	5	
	Good	4	
	Fair	3	
	Poor	2	
	Very Poor	1	
Would you recommend using this service provider in future?	Yes	No	If no, provide reasons:

**OVERALL PERFORMANCE**

Excellent		Good		Fair		Poor		Very Poor	
-----------	--	------	--	------	--	------	--	-----------	--

Name of Authorized Person \_\_\_\_\_

Designation \_\_\_\_\_

Email Address \_\_\_\_\_

Contact number \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

**Official Stamp**



**5.REFERENCE FOR THE BIDDER**

<b>Name of Institution (Client)</b>	
<b>Contract/Tender Number</b>	
<b>Contract Description</b>	
<b>Name of Service Provider (Bidder)</b>	
<b>Value of project</b>	
<b>Commencement Date</b>	
<b>Contractual Completion Date</b>	
<b>Bidder's Completion Date</b>	

**1.1 Please score the performance of the above-mentioned company by marking the relevant box**

<b>Performance Rating</b>			<b>Comments</b>
Work performed in compliance with contract terms.	Excellent	5	
	Good	4	
	Fair	3	
	Poor	2	
	Very Poor	1	
Financial Status of the bidder in relation to the work to be performed.	Excellent	5	
	Good	4	
	Fair	3	
	Poor	2	
	Very Poor	1	
Timelines of work are met.	Excellent	5	
	Good	4	
	Fair	3	
	Poor	2	
	Very Poor	1	



Customer services.	Excellent	5	
	Good	4	
	Fair	3	
	Poor	2	
	Very Poor	1	
Quality of Service.	Excellent	5	
	Good	4	
	Fair	3	
	Poor	2	
	Very Poor	1	
Communication and accessibility.	Excellent	5	
	Good	4	
	Fair	3	
	Poor	2	
	Very Poor	1	
Documentation records, receipts, invoices and computer-generated reports received in a timely manner and in compliance with contract specification	Excellent	5	
	Good	4	
	Fair	3	
	Poor	2	
	Very Poor	1	
Would you recommend using this service provider in future?	Yes	No	If no, provide reasons:

**OVERALL PERFORMANCE**

Excellent		Good		Fair		Poor		Very Poor	
-----------	--	------	--	------	--	------	--	-----------	--

Name of Authorized Person \_\_\_\_\_

Designation \_\_\_\_\_

Email Address \_\_\_\_\_

Contact number \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

**Official Stamp**



# ATTACH FINANCIAL PROPOSAL



## JOINT VENTURE DISCLOSURE FORM

### **GENERAL**

- i) All the information requested must be filled in the spaces provided. If additional space is required, additional sheets may be used and attached to the original documents.
- ii) A copy of the joint venture agreement must be attached to this form, in order to demonstrate the Affirmable, Joint Venture Partner's share in the ownership, control, management responsibilities, risks and profits of the joint venture, the proposed joint venture agreement must include specific details relating to:
  - a) the contributions of capital and equipment
  - b) work items to be performed by the Affirmable Joint Venture Partner's own forces
  - c) work items to be performed under the supervision of the Affirmable Joint Venture Partner.
- iii) Copies of all written agreements between partners concerning the contract must be attached to this form including those, which relate to ownership options and to restrictions/limits regarding ownership and control.
- iv) ABE partners must complete ABE Declaration Affidavits.
- v) The joint venture must be formalised. All pages of the joint venture agreement must be signed by all the parties concerned. A letter/ notice of intention to formalise a joint venture once the contract has been awarded will not be considered.
- vi) should any of the above not be complied with, the joint venture will be deemed null and void and will be considered non-responsive.

### **1. JOINT VENTURE PARTICULARS**

- a) Name .....
- b) Postal address.....  
.....  
.....  
.....  
.....



c) Physical address.....  
.....  
.....

d) Telephone .....

e) Fax .....

**2. IDENTITY OF EACH NON-AFFIRMABLE JOINT VENTURE PARTNER**

**2.1(a)** Name of Firm .....

Postal Address.....

Physical Address .....

Telephone.....

Fax .....

Contact person for matters pertaining to Joint Venture Participation Goal requirements:

**2.2(a)** Name of Firm .....

Postal Address.....

Physical Address .....

Telephone.....

Fax .....

Contact person for matters pertaining to Joint Venture Participation Goal requirements:

.....  
*(Continue as required for further non-Affirmable Joint Venture Partners)*

**IDENTITY OF EACH AFFIRMABLE JOINT VENTURE PARTNER**

**3.1(a)** Name of Firm .....

Postal Address.....



Physical Address .....

Telephone.....

Fax .....

Contact person for matters pertaining to Joint Venture Participation Goal requirements:

.....

**3.2(a)** Name of Firm .....

Postal Address.....

Physical Address .....

Telephone.....

Fax .....

Contact person for matters pertaining to Joint Venture Participation Goal requirements:

.....

**3.3(a)** Name of Firm .....

Postal Address.....

Physical Address .....

Telephone.....

Fax .....

Contact person for matters pertaining to Joint Venture Participation Goal requirements:

.....

**1. BRIEF DESCRIPTION OF THE ROLES OF THE AFFIRMABLE JOINT VENTURE PARTNERS IN THE JOINT VENTURE**

.....

.....

.....



5. **OWNERSHIP OF THE JOINT VENTURE**

a) Affirmable Joint Venture Partner ownership percentage(s) .....%

b) Non-Affirmable Joint Venture Partner ownership percentage(s) .....%

c) Affirmable Joint Venture Partner percentages in respect of: \*

(i) .....

Profit and loss sharing .....

(ii) .....

Initial capital contribution in Rands .....

.....

.....

(\*Brief descriptions and further particulars should be provided to clarify percentages).

(iii) .....

Anticipated on-going capital contributions in Rands .....

.....

.....

(iv) Contributions of equipment (specify types, quality, and quantities of equipment) to be provided by each partner.

.....

.....

.....

5. **RECENT CONTRACTS EXECUTED BY PARTNERS IN THEIR OWN RIGHT AS PRIME CONTRACTORS OR AS PARTNERS IN OTHER JOINT VENTURES**



	<b>NON-AFFIRMABLE JOINT VENTURE PARTNERS</b>	<b>PARTNER NAME</b>
a)		
b)		
c)		
d)		
e)		

	<b>AFFIRMABLE JOINT VENTURE PARTNERS</b>	<b>PARTNER NAME</b>
a)		
b)		
c)		
d)		
e)		

**7. CONTROL AND PARTICIPATION IN THE JOINT VENTURE**

(Identify by name and firm those individuals who are, or will be, responsible for, and have authority to engage in the relevant management functions and policy and decision making, indicating any limitations in their authority e.g. co-signature requirements and Rand limits).

(a) Joint Venture cheque signing

.....

.....

.....

(b) Authority to enter into contracts on behalf of the Joint Venture

.....

.....

.....

(c) Signing, co-signing and/or collateralising of loans

.....

.....



.....  
(d) Acquisition of lines of credit

.....  
.....  
.....

(e) Acquisition of performance bonds

.....  
.....  
.....

(f) Negotiating and signing labour agreements

.....  
.....  
.....

**8. MANAGEMENT OF CONTRACT PERFORMANCE**  
(Fill in the name and firm of the responsible person).

- (a) Supervision of field operations.....
- (b) Major purchasing.....
- (c) Estimating .....
- (d) Technical management .....

**9. MANAGEMENT AND CONTROL OF JOINT VENTURE**

- (a) Identify the “managing partner”, if any,  
.....



.....  
 .....  
 .....

(b) What authority does each partner have to commit or obligate the other to financial institutions, insurance companies, suppliers, subcontractors and/or other parties participating in the execution of the contemplated works?

.....  
 .....  
 .....  
 .....

(c) Describe the management structure for the Joint Venture's work under the contract

MANAGEMENT FUNCTION / DESIGNATION	NAME	PARTNER*

(Fill in "ex Affirmable Joint Venture Partner" or "ex non-Affirmable Joint Venture Partner".

**10. PERSONNEL**

(a) State the approximate number of operative personnel (by trade/function/discipline) needed to perform the Joint Venture work under the Contract.



TRADE/FUNCTION/ DISCIPLINE	NUMBER EX AFFIRMABLE JOINT VENTURE PARTNERS	NUMBER EX NON- AFFIRMABLE JOINT VENTURE PARTNERS

(Fill in “ex Affirmable Joint Venture Partner” or “ex non-Affirmable Joint Venture Partner”).

(b) Number of operative personnel to be employed on the Contract who are currently in the employ of partners.

(i) Number currently employed by Affirmable Joint Venture Partners

.....

(ii) Number currently employed by the Joint Venture

.....

(c) Number of operative personnel who are not currently in the employ of the respective partner and will be engaged on the project by the Joint Venture

.....

(d) Name of individual(s) who will be responsible for hiring Joint Venture employees

.....

.....

(e) Name of partner who will be responsible for the preparation of Joint Venture payrolls

.....



**11. CONTROL AND STRUCTURE OF THE JOINT VENTURE**

Briefly describe the manner in which the Joint Venture is structured and controlled.

.....  
.....  
.....

The undersigned warrants that he/she is duly authorised to sign this Joint Venture Disclosure Form and affirms that the foregoing statements are true and correct and include all material information necessary to identify and explain the terms and operations of the Joint Venture and the intended participation of each partner in the undertaking.

The undersigned further covenants and agrees to provide the Employer with complete and accurate information regarding actual Joint Venture work and the payment therefore, and any proposed changes in any provisions of the Joint Venture agreement, and to permit the audit and examination of the books, records and files of the Joint Venture, or those of each partner relevant to the Joint Venture, by duly authorised representatives of the Employer.

Signature .....

Duly authorized to sign on behalf of .....

Name .....

Address.....

Telephone.....

Date .....

---

Signature .....

Duly authorized to sign on behalf of .....

Name .....

Address.....

Telephone.....



Date .....

---

Signature .....

Duly authorized to sign on behalf of .....

Name .....

Address.....

Telephone.....

Date .....

---

Signature .....

Duly authorized to sign on behalf of .....

Name .....

Address.....

Telephone.....

Date .....

---



## JOINT VENTURE AGREEMENT

Bidders who tender as a Joint Venture must submit a Joint Venture Agreement here.



**COMPANY DETAILS**

The following company details schedule must be completed to ensure that the prerequisite requirements to bidding are met.

Registered Company Name	
Company Registration Number	
VAT Number	
Bank Name	
Branch Name	
Bank Account Number	
Professional Registration Details	
Professional Indemnity Details	



**PROOF OF INSURANCE AND LIABILITY COVER**

**(NB) Please attach proof of insurance and liability cover to the next page.**



ATTACH PROOF OF INSURANCE AND LIABILITY  
COVER HERE



## AUTHORITY TO SIGN BID DOCUMENTS

In the case of a bid being submitted on behalf of a company, close corporation or partnership, evidence must be submitted to ECPTA at the time of submission of the bid that the bid has been signed by persons properly authorized thereto by resolution of the directors or under the articles of the entity.

**Please attach proof to the next page.**



# ATTACH RESOLUTION OF SIGNATORY

