

**INVITATION TO BID: FMA 0006-2023/24**

**VALIDITY PERIOD OF BID OFFER: 90 DAYS FROM CLOSING DATE**

The Department of the Premier wishes to invite potential bidders in the Systems Coaching Services Sector to submit a Bid for the procurement of a System Coaching Programme for the Western Cape Government (WCG) for a period of 24 (twenty-four) months

**BID NUMBER:** FMA 0006-2023/24

**Contact person:** Janetta Botha / Felicia Jogie

**Date of advertisement:** 20 November 2023

**Closing Date and Time:** 12 December 2023

**Non-Compulsory Briefing Session:** Wednesday, 29 November 2023 @ 09H30  
via Microsoft Teams (Online Application)

In order to participate, potential Bidders must ensure that an e-mail address (representative) is sent to [John.vanDerVent@westerncape.gov.za](mailto:John.vanDerVent@westerncape.gov.za) on or before Monday, 27 November 2023 at 17H00.

**NB!** Microsoft Teams Application needs to be installed on the relevant platform in order to participate (e.g. Cell Phone, Laptop and or Desktop).

Late bid offers shall not be admitted for consideration.

Bidders to note that should the Bid document be too big to fit into the Bid Box, to please contact the following Supply Chain Management official/s who will ensure that bid documents get deposited into the bid box before the closing date and time: John Van Der Vent – 021 483 8213

Completed and signed (in ink) bid documents must be submitted on the official bid forms and may not be re-typed.

Completed and signed (in ink) bid documents if posted must be addressed to:

The Director, Supply Chain Management and Administration, P.O. Box 659 Cape Town, 8000 and sufficient time must be allowed for the delivery of the bid to the offices of SCM, situated in 7 Wale Street, Cape Town.

Or

**DEPOSITED IN THE DEPARTMENT OF THE PREMIER TENDER BOX SITUATED ON THE GROUND FLOOR (ENTRANCE) OF NO. 4 DORP STREET, CAPE TOWN (CNR KEEROM AND DORP STREET) before the closing time of the bid.**

RFB/s will be regarded as late if received after the closing time of the bid.

The Department of the Premier (DotP) reserves the right to cancel the bid at any stage of the process.

**ALL PRICES MUST BE QUOTED IN RSA CURRENCY AND MUST BE INCLUSIVE OF VAT.**

The service provider/s must comply with the conditions for the processing of personal information as prescribed by the Protection of Personal Information Act, No 4 of 2013 (POPI). The service provider/s is required to provide the WCG with a certificate confirming that the personal information provided to the service provider/s by the WCG has been destroyed.

This bid is subject to the Preferential Procurement Policy Framework Act and the Preferential Procurement Regulations 2022, the General Conditions of Contract (GCC) and any other Conditions and or Special Conditions of Contract that might be stipulated in the requirement. Bidder's attention is drawn to the fact that amendments to any of the Bid Conditions or setting of counter conditions by bidders may result in the invalidation of such bids.

The successful bidder will be required to sign a written contract form within 7 days after the award of the bid.

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## PART A INVITATION TO BID

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

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

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

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

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

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

### YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)

BID NUMBER:	FMA 0006-2023/24	CLOSING DATE:	12 DECEMBER 2023	CLOSING TIME:	11H00
DESCRIPTION:	PROCUREMENT OF A SYSTEM COACHING PROGRAMME FOR THE WESTERN CAPE GOVERNMENT (WCG) FOR A PERIOD OF 24 (TWENTY-FOUR) MONTHS				

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

BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT THE GROUND FLOOR (ENTRANCE) OF NO. 4 DORP STREET, CAPE TOWN (CNR KEEROM AND DORP STREET) before the closing time of the bid.

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO		TECHNICAL ENQUIRIES MAY BE DIRECTED TO:	
CONTACT PERSON	John van Der Vent / Kim-Leigh February	CONTACT PERSON	Janetta Botha / Felicia Jogie
TELEPHONE NUMBER	021-483-8213 / 021-483-2943	TELEPHONE NUMBER	021-466-9700/6
FACSIMILE NUMBER	N/A	FACSIMILE NUMBER	N/A
E-MAIL ADDRESS	<a href="mailto:John.vanDerVent@westerncape.gov.za">John.vanDerVent@westerncape.gov.za</a> / <a href="mailto:Kim-Leigh.February@westerncape.gov.za">Kim-Leigh.February@westerncape.gov.za</a>	E-MAIL ADDRESS	<a href="mailto:Janetta.Botha@westerncape.gov.za">Janetta.Botha@westerncape.gov.za</a> / <a href="mailto:Felicia.Jogie@westerncape.gov.za">Felicia.Jogie@westerncape.gov.za</a>

### SUPPLIER INFORMATION

NAME OF BIDDER			
POSTAL ADDRESS			
STREET ADDRESS			
TELEPHONE NUMBER	CODE	NUMBER	
CELLPHONE NUMBER			
FACSIMILE NUMBER	CODE	NUMBER	
E-MAIL ADDRESS			
VAT REGISTRATION NUMBER			
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:	AND	CENTRAL SUPPLIER DATABASE No: MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	[TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No	B-BBEE STATUS LEVEL SWORN AFFIDAVIT	[TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No
IF YES, WAS THE CERTIFICATE ISSUED BY A VERIFICATION AGENCY ACCREDITED BY THE SOUTH AFRICAN NATIONAL ACREDITATION SYSTEM (SANAS)	[TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No		

**[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/SWORN AFFIDAVIT (FOR EMEs& QSEs) MUST BE SUBMITTED TOGETHER WITH A COMPLETED 6.1 IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]**

ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS/ SERVICES/ WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
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**QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS**

IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?	<input type="checkbox"/> YES <input type="checkbox"/> NO
DOES THE ENTITY HAVE A BRANCH IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?	<input type="checkbox"/> YES <input type="checkbox"/> NO
<b>IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.</b>	

## PART B

### TERMS AND CONDITIONS FOR BIDDING

**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, 2022, 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 (WCBD7).**

**2. TAX COMPLIANCE REQUIREMENTS**

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

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

SIGNATURE OF BIDDER:

.....

CAPACITY UNDER WHICH THIS BID IS SIGNED:

.....

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

DATE:

.....

**PRICING SCHEDULE**  
**(Professional Services)**

**It is a condition of this tender that a bidder's financial proposal must be indicated on, and in the format of, this pricing schedule. Non-compliance of a bid in this regard shall render that bid unacceptable.**

Name of Bidder.....Bid number: **FMA 0006-2023/24**

Closing Time: **11H00**

Closing date: **12 December 2023**

OFFER TO BE VALID FOR **90** DAYS FROM THE CLOSING DATE OF BID

**PROCUREMENT OF A SERVICE PROVIDER THE TO PROVIDE A SYSTEM COACHING  
PROGRAMME TO THE DEPARTMENT OF THE PREMIER WITHIN THE WESTERN CAPE  
GOVERNMENT FOR A PERIOD OF 24 (TWENTY-FOUR) MONTHS**

<b>QUANTITY (ESTIMATE)</b>	<b>SERVICE</b>	<b>Rate Type</b>	<b>All-inclusive, including all applicable taxes, Service Rate Year 1</b>	<b>Total Bid price in RSA currency Year 1 (Estimated Quantity x Service Rate) (all applicable taxes included)</b>
Eight (8) hour session	Alignment and planning workshop	One (1) hour session rate	R	R
1 plan	System Coaching Programme Plan	1 plan	R	R

2 report templates	Development of an individual and group theme report template	1 report template	R	R
Ten (10) hours	One (1) Managing System Coach to facilitate face to face leadership group session	One (1) hour session rate	R	R
Two (2) hours	One (1) Managing System Coach to facilitate virtual group session	One (1) hour session rate	R	R
Two (2) hours	One (1) System Coach to facilitate face to face leadership group session (where so requested by DOTP)	One (1) hour session rate	R	R
Two (2) hours	One (1) System Coach to facilitate virtual group session (where so requested by DOTP)	One (1) hour session rate	R	R
Forty-Eight (48) hours	One-on-one face to face coaching session with Managing System Coach or System Coach	One (1) hour session rate	R	R

Forty-Eight (48) hours	One-on-one virtual coaching session with Managing System Coach or System Coach	One (1) hour session rate	R	R
Five Hundred and Four (504) hours	In person observation session of leadership in context by Managing System Coaches and System Coach	One (1) hour session rate	R	R
4 reports	Generation of group theme report by two Managing System Coaches	One (1) report	R	R
Forty-Eight (48) 360-degree assessments	Platform to be utilised for 360 degree assessment questionnaire and generate automated report (Consider 1 person with 6 raters)	One (1) 360 degree assessment and automated report	R	R
2 modules	Design and Development of one four (4) hour culture competencies content/ module.	1 module	R	R



2 modules transferred	Transferring of one (1), four (4) hour Culture competencies module to e-learning content and the e-learning platform.	1 module transferred	R	R
24 Licenses	Access and use of an interactive e-learning platform to access modules	One (1) employee, for one (1) year	R	R
<b>TOTAL</b>				<b>R</b>

Please provide details of duly designated or authorised person submitting the price schedule on behalf of the bidder:

**Print Name(s) and Surname:** \_\_\_\_\_

**Designation:** \_\_\_\_\_

**Signature:** \_\_\_\_\_

**For Bidding enquiries:**

Name: Kim-Leigh February / John van der Vent

E-mail: [Kim-Leigh.February@westerncape.gov.za](mailto:Kim-Leigh.February@westerncape.gov.za) /

[john.vandervent@westerncape.gov.za](mailto:john.vandervent@westerncape.gov.za)

Tel: 021-483-2943/021-483-8213

**For Technical enquiries:**

Name: Janetta Botha / Felicia Jogie

E-mail: [Janetta.Botha@westerncape.gov.za](mailto:Janetta.Botha@westerncape.gov.za) /

[Felicia.Jogie@westerncape.gov.za](mailto:Felicia.Jogie@westerncape.gov.za)

Tel: 021-466-9700/6

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

1. To give effect to the requirements of the Western Cape Provincial Treasury Instructions, 2019: Supply Chain Management (Goods and Services), Public Finance Management Act (PFMA) Supply Chain Management (SCM) Instruction No. 3 of 2021/2022 - SBD 4 Declaration of Interest, Section 4 (1)(b)(iii) of the Competition Act No. 89 of 1998 as amended together with its associated regulations, the Prevention and Combating of Corrupt Activities Act No 12 of 2004 and regulations pertaining to the tender defaulters register, Paragraph 16A9 of the National Treasury Regulations and/or any other applicable legislation.
2. 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.
3. All prospective bidders intending to do business with the Institution must be registered on the Central Supplier Database (CSD) and the Western Cape Supplier Evidence Bank (WCSEB) if they wish to do business with the Western Cape Government (WCG) via the electronic Procurement Solution (ePS).
4. The status of enterprises and persons listed on the National Treasury's Register for Tender Defaulters will be housed on the ePS. Institutions may not under any circumstances procure from enterprises and persons listed on the Database of Tender Defaulters.
5. The status of suppliers listed on the National Treasury's Database of Restricted Suppliers will be housed on the ePS; however, it remains incumbent on institutions to check the National Treasury Database of Restricted Suppliers before the conclusion of any procurement process. For suppliers listed as restricted, institutions must apply due diligence and risk assessment before deciding to proceed with procurement from any such supplier.

**6. Definitions**

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

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

***If you know of any corrupt, fraudulent or collusive actions in the Institution, please report it by calling the National Hotline 0800 701 701***

*This form must be completed annually. Should the information herein declared change in the course of the year or before the next renewal or in relation to any bid, quotation or contract, it is the entity's responsibility to advise the Institution in writing of the change in such details.*



**"business interest"** means -

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

**"Consortium or Joint Venture"** means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract;

**"Controlling interest"** means, the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise;

**"Corruption"**- General offences of corruption are defined in the Combating of Corrupt Activities Act, 2004 (Act No 12 of 2004) as:

Any person who directly or indirectly -

- (a) accepts or agrees or offers to accept any gratification from any other person, whether for the benefit of himself or herself or for the benefit of another person; or
- (b) gives or agrees or offers to give to any other person any gratification, whether for the benefit of that other person or for the benefit of another person, in order to act personally or by influencing another person so to act, in a manner—
  - (i) that amounts to the-
    - (aa) illegal, dishonest, unauthorised, incomplete, or biased; or
    - (bb) misuse or selling of information or material acquired in the course of the exercise, carrying out or performance of any powers, duties or functions arising out of a constitutional, statutory, contractual or any other legal obligation;
  - (ii) that amounts to-
    - (aa) the abuse of a position of authority;
    - (bb) a breach of trust; or
    - (cc) the violation of a legal duty or a set of rules;
  - (iii) designed to achieve an unjustified result; or
  - (iv) that amounts to any other unauthorised or improper inducement to do or 45 not to do anything, of the, is guilty of the offence of corruption.

**"CSD"** means the Central Supplier Database maintained by National Treasury;

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**"employee"**, in relation to –

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

**"entity"** means any –

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

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

**"Family member"** means a person's –

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

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

**"Institution"** means –

a provincial department or provincial public entity listed in Schedule 3C of the Act;

**"Provincial Government Western Cape (PGWC)"** means

- (a) the Institution of the Western Cape, and
- (b) a provincial public entity;

**"RWOEE"** means –

Remunerative Work Outside of the Employee's Employment

**"spouse"** means a person's –

- (a) partner in marriage or civil union according to legislation;
- (b) partner in a customary union according to indigenous law; or
- (c) partner with whom he or she cohabits and who is publicly acknowledged by the person as his or her life partner or permanent companion.

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7. Regulation 13(c) of the Public Service Regulations (PSR) 2016, effective 1 February 2017, prohibits any employee from conducting business with an organ of state, or holding a directorship in a public or private company doing business with an organ of state unless the employee is a director (in an official capacity) of a company listed in schedules 2 and 3 of the Public Finance Management Act.
- a) Therefore, by 31 January 2017 all employees who are conducting business with an organ of state should either have:
- (i) resigned as an employee of the government institution or;
  - (ii) cease conducting business with an organ of state or;
  - (iii) resign as a director/shareholder/owner/member of an entity that conducts business with an organ of state.
8. Any legal person, or their family members, may make an offer or offers in terms of this invitation to bid. In view of potential conflict of interest, in the event that the resulting bid, or part thereof, be awarded to family members of persons employed by an organ of state, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where the bidder is employed by the Institution.
9. The bid of any bidder may be disregarded if that bidder or any of its directors abused the institution's supply chain management system; committed fraud or any other improper conduct in relation to such system; disclosure is found not to be true and complete; or failed to perform on any previous contract.
10. Section 4(1)(b)(iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging). Collusive bidding is a per se prohibition meaning that it cannot be justified under any grounds.
11. Treasury Regulation 16A9 prescribes that accounting officers and accounting authorities must take all reasonable steps to prevent abuse of the supply chain management system and authorises accounting officers and accounting authorities to:
- a) disregard the bid of any bidder if that bidder, or any of its directors have abused the institution's supply chain management system and or committed fraud or any other improper conduct in relation to such system.
  - b) cancel a contract awarded to a supplier of goods and services if the supplier committed any corrupt or fraudulent act during the bidding process or the execution of that contract.
12. Communication between partners in a joint venture or consortium will not be construed as collusive bidding.

**If you know of any corrupt, fraudulent or collusive actions in the Institution, please report it by calling the National Hotline 0800 701 701**

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

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

TABLE A

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

If you know of any corrupt, fraudulent or collusive actions in the Institution, please report it by calling the National Hotline 0800 701 701

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

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

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

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

**TABLE B**

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

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

If you know of any corrupt, fraudulent or collusive actions in the Institution, please report it by calling the National Hotline 0800 701 701

This form must be completed annually. Should the information herein declared change in the course of the year or before the next renewal or in relation to any bid, quotation or contract, it is the entity's responsibility to advise the Institution in writing of the change in such details.



**SECTION C: PERFORMANCE MANAGEMENT AND BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES**

To enable the prospective bidder to provide evidence of past and current performance.

<b>C1.</b>	Did the entity conduct business with an organ of state in the last twelve months? (If yes complete Table C)	NO	YES
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**C2. TABLE C**

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

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

If you know of any corrupt, fraudulent or collusive actions in the Institution, please report it by calling the National Hotline 0800 701 701

This form must be completed annually. Should the information herein declared change in the course of the year or before the next renewal or in relation to any bid, quotation or contract, it is the entity's responsibility to advise the Institution in writing of the change in such details.



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

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

- I, ..... hereby swear/affirm;
- i. that the information disclosed above is true and accurate;
  - ii. that I have read understand the content of the document;
  - iii. that I have arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor.
  - iv. that the entity undertakes to independently arrive at any offer at any time to the Institution without any consultation, communication, agreement or arrangement with any competitor. In addition, that there will be no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specification, 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;
  - v. that the entity or its representative are aware of and undertakes not to disclose the terms of any bid, formal or informal, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract; and
  - vi. that there have been no consultations, communications, agreements or arrangements made 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 that my entity was not involved in the drafting of the specifications or terms of reference for this bid.

**DULY AUTHORISED REPRESENTATIVE'S SIGNATURE**

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

- 1.1 Do you know and understand the contents of the declaration? ANSWER: .....
- 1.2 Do you have any objection to taking the prescribed oath? ANSWER: .....
- 1.3 Do you consider the prescribed oath to be binding on your conscience? ANSWER: .....
- 1.4 Do you want to make an affirmation? ANSWER: .....
2. I certify that the deponent has acknowledged that he/she knows and understands the contents of this declaration, which was sworn to/affirmed and the deponent's signature/thumbprint/mark was place thereon in my presence.

.....  
SIGNATURE FULL NAMES Commissioner of Oaths

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

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

Business Address: .....

.....

**If you know of any corrupt, fraudulent or collusive actions in the Institution, please report it by calling the National Hotline 0800 701 701**

*This form must be completed annually. Should the information herein declared change in the course of the year or before the next renewal or in relation to any bid, quotation or contract, it is the entity's responsibility to advise the Institution in writing of the change in such details.*

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

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

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

### 1. DEFINITIONS

- 1.1 **“acceptable tender”** means any tender which, in all respects, complies with the specifications and conditions of tender as set out in the tender document.
- 1.2 **“affidavit”** is a type of verified statement or showing, or in other words, it contains a verification, meaning it is under oath or penalty of perjury, and this serves as evidence to its veracity and is required for court proceedings.
- 1.3 **“all applicable taxes”** includes value-added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies;
- 1.4 **“B-BBEE”** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- 1.5 **“B-BBEE status level of contributor”** means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- 1.6 **“bid”** means a written offer on the official bid documents or invitation of price quotations and “tender” is the act of bidding /tendering;
- 1.7 **“Code of Good Practice”** means the generic codes or the sector codes as the case may be;
- 1.8 **“consortium or joint venture”** means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract;
- 1.9 **“contract”** means the agreement that results from the acceptance of a bid by an organ of state;
- 1.10 **“EME”** is an Exempted Micro Enterprise with an annual total revenue of R10 million or less.

- 1.11 **"Firm price"** means the price that is only subject to adjustments in accordance with the actual increase or decrease resulting from the change, imposition, or abolition of customs or excise duty and any other duty, levy, or tax, which, in terms of the law or regulation, is binding on the contractor and demonstrably has an influence on the price of any supplies, or the rendering costs of any service, for the execution of the contract;
- 1.12 **"Large Enterprise"** is any enterprise with an annual total revenue above R50 million;
- 1.13 **"non-firm prices"** means all prices other than "firm" prices;
- 1.14 **"person"** includes a juristic person;
- 1.15 **"price"** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- 1.16 **"proof of B-BBEE status level contributor"** means-
- (a) The B-BBEE status level certificate issued by an authorized body or person;
  - (b) A sworn affidavit as prescribed in terms of the B-BBEE Codes of Good Practice; or
  - (c) Any other requirement prescribed in terms of the Broad- Based Black Economic Empowerment Act.
- 1.17 **QSE** is a Qualifying Small Enterprise with an annual total revenue between R10 million and R50 million;
- 1.18 **"rand value"** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- 1.19 **"sub-contract"** means the primary contractor's assigning, leasing, making out work to, or employing, another person to support such primary contractor in the execution of part of a project in terms of the contract.
- 1.20 **"tender"** means a written offer in the form determined by an organ of state in response to an invitation to provide or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- 1.21 **"tender for income-generating contracts"** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions;
- 1.22 **"the Act"** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000);
- 1.23 **"the Regulations"** means the Preferential Procurement Regulations, 2022;
- 1.24 **"total revenue"** bears the same meaning assigned to this expression in the Codes of Good Practice on Black Economic Empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic

- 1.25 “**trust**” means the arrangement through which the property of one person is made over or bequeathed to a trustee to administer such property for the benefit of another person; and
- 1.26 “**trustee**” means any person, including the founder of a trust, to whom property is bequeathed in order for such property to be administered for the benefit of another person.

## 2. GENERAL CONDITIONS

- 2.1 The following preference point systems are applicable to all bids:
- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
  - the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).
- 2.2 Preference point system for this bid:
- (a) The value of this bid is estimated to exceed/not exceed R50 000 000 (all applicable taxes included) and therefore the **80/20** preference point system shall be applicable; or
- (b) Either the 80/20 or 90/10 preference point system will be applicable to this tender  
(delete whichever is not applicable for this tender).
- 2.3 Preference points for this bid (even in the case of a tender for income-generating contracts) shall be awarded for:
- (a) Price; and
- (b) B-BBEE Status Level of Contribution.
- 2.4 The maximum points for this bid are allocated as follows:

	POINTS
<b>PRICE</b>	<b>80</b>
<b>B-BBEE STATUS LEVEL OF CONTRIBUTOR</b>	<b>20</b>
<b>Total points for Price and B-BBEE must not exceed</b>	<b>100</b>

- 2.5 Failure on the part of a bidder to fill in, sign this form and submit in the circumstances prescribed in the Codes of Good Practice either a B-BBEE Verification Certificate issued by a Verification Agency accredited by the South African Accreditation System (SANAS) or an affidavit confirming annual total revenue and level of black ownership together with the bid or an affidavit issued by Companies Intellectual Property Commission, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.
- 2.6 The organ of state reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the purchaser.

### 3. ADJUDICATION USING A POINT SYSTEM

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

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

#### 4.1 POINTS AWARDED FOR PRICE

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

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

80/20	or	90/10
$P_s = 80 \left( 1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$	or	$P_s = 90 \left( 1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$

Where

- $P_s$  = Points scored for price of bid under consideration
- $P_t$  = Price of tender under consideration
- $P_{\min}$  = Price of lowest acceptable tender

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

### 5.1 POINTS AWARDED FOR PRICE

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

80/20 or 90/10

$$Ps = 80 \left( 1 + \frac{Pt - P_{max}}{P_{max}} \right) \quad \text{OR} \quad Ps = 90 \left( 1 + \frac{Pt - P_{max}}{P_{max}} \right)$$

Where

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

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

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

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

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



issued by Companies Intellectual Property Commission.

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

## 7. BID DECLARATION

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

## 8. B-BBEE STATUS LEVEL OF CONTRIBUTION CLAIMED IN TERMS OF PARAGRAPH 5

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

*(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 5.1 and must be substantiated by means of a B-BBEE certificate issued by a Verification Agency accredited by SANAS or an affidavit confirming annual total revenue and level of black ownership in terms of the relevant sector code applicable to the tender.*

## 9. SUB-CONTRACTING

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

- 9.1.1 If yes, indicate:

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

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

## 10. DECLARATION WITH REGARD TO COMPANY/FIRM

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

## 10.4 TYPE OF COMPANY/ FIRM

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

[SELECT APPLICABLE ONE]

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

- (a) The Western Cape Government reserves the right to audit the B-BBEE status claim submitted by the bidder.**
- (b) As set out in Section 130 of the B-BBEE Act as amended, any misrepresentation constitutes a criminal offence. A person commits an offence if that person knowingly:**
  - (i) misrepresents or attempts to misrepresent the B-BBEE status of an enterprise;**
  - (ii) provides false information or misrepresents information to a B-BBEE Verification Professional in order to secure a particular B-BBEE status or any benefit associated with compliance to the B-BBEE Act;**
  - (iii) provides false information or misrepresents information relevant to assessing the B-BBEE status of an enterprise to any organ of state or public entity; or**
  - (iv) engages in a fronting practice.**
- (c) If a B-BBEE verification professional or any procurement officer or other official of an organ of state or public entity becomes aware of the commission of, or any attempt to commit any offence referred to in paragraph 9.1 (a) above will be reported to an appropriate law enforcement agency for investigation.**
- (d) Any person convicted of an offence by a court is liable in the case of contravention of 9.4 (b) to a fine or to imprisonment for a period not exceeding 10 years or to both a fine and such imprisonment or, if the convicted person is not a natural person to a fine not exceeding 10% of its annual turnover.**
- (e) The purchaser may, if it becomes aware that a bidder may have obtained its B-BBEE status level of contribution on a fraudulent basis, investigate the matter. Should the**

*investigation warrant a restriction be imposed, this will be referred to the National Treasury for investigation, processing and imposing the restriction on the National Treasury's List of Restricted Suppliers. The bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, may be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the audi alteram partem (hear the other side) rule has been applied.*

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

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

**DATE:** .....

**ADDRESS:** .....

.....

**WITNESSES:**

1. ....

2. ....



## **TERMS OF REFERENCE (T.O.R)**

## 1. PURPOSE & GENERAL REQUIREMENTS

- 1.1 The Department of the Premier (hereinafter referred to as "DOTP") within the Western Cape Government (WCG) wishes to invite potential bidders in the Systems Coaching Services Sector to provide a System Coaching Programme WCG for a period of 24 (twenty-four) months. These services would be required based on demand and as the needs within the WCG dictate.
- 1.2 Potential bidders may ask for clarification on these Terms of Reference or any of its Annexures up to 72 hours before the deadline for the submission of bids. Any request for clarification must be submitted to DOTP's Supply Chain Management (SCM) unit by e-mail, addressed to Ms Kim-Leigh February and Mr John van Der Vent:

[Kim-leigh.February@westerncape.gov.za](mailto:Kim-leigh.February@westerncape.gov.za); and  
[John.vanDerVent@westerncape.gov.za](mailto:John.vanDerVent@westerncape.gov.za).

Answers to any written queries referred to SCM in accordance with this paragraph 1.2 will be responded to via email, which information will also be published on the eTenders portal at <https://www.etenders.gov.za/>.

- 1.3 No late bids will be accepted after the closing time on the closing date.
- 1.4 Bidders may not contact the WCG on any matter pertaining to their bid from the time that the bids are submitted (the bid closing time) to the time the contract is awarded. Any effort by a bidder to influence bid evaluation, bid comparisons or bid award decisions in any manner will result in rejection of the bid concerned.
- 1.5 Briefing Session

- 1.5.1 A non-compulsory virtual briefing session will be held on:

Date: 29 November 2023  
Time: 09H30 – 10H30  
Venue: Microsoft Teams meeting invite

- 1.5.2 Bidders are requested and **encouraged** to attend the virtual briefing session so that clarification on the Terms of Reference and expectations of DOTP can be provided in respect of this invitation to bid.
- 1.5.3 Bidders are furthermore requested to inform DOTP by email that it intends submitting a bid proposal to ensure that any further information and updates to the invitation of bid may be provided to all bidders to enable them to submit compliant bids, which information will also be published on the eTenders portal at <https://www.etenders.gov.za/>.
- 1.6 Please note that the DOTP is not bound to accept any bid submitted. DOTP will furthermore only accept bids that meet the compulsory bid conditions set out in paragraph 4 below and may cancel the tender process at any time prior to the award of the tender contemplated herein for any of the following reasons:
- 1.6.1 Due to changed circumstances for instance, if there is no longer a need for the services as specified in these Terms of Reference or, there is no longer a need for such services on the terms set out in these Terms of Reference;
- 1.6.2 Funds are no longer available to cover any envisaged expenditure;
- 1.6.3 No acceptable bids are received; or
- 1.6.4 There is a material irregularity in the tender process.
- 1.7 The envisaged commencement date for the contract(s) contemplated herein is **01 February 2024** and the successful bidder to be appointed will be required to enter into a Service Level Agreement with DOTP once the said bid has been awarded.

## **2. INTRODUCTION AND BACKGROUND**

- 2.1 The WCG Culture journey has been driven since 2019 and we are working towards creating a new way of work within the WCG where citizens are at the centre of planning. The WCG has come to a point where a new way of working has come forward in various approaches and programmes and WCG needs to embed this into the organisational system to enhance the WCG's culture. Culture needs to be actively spoken about and authentically lived. As such, a culture recipe was created to combine leader led conversations, experiential learning, practices alignment, peer learning, measurement with targeted education, based on facts and fundamentals about our culture's new way of work. The purpose of all of this is to effect necessary changes to allow for real and effective culture change, which enhances citizen centricity.



- 2.2 The Behaviour Change Strategy of the WCG (see Annexure A: Behaviour Change Strategy Proposal and Annexure B: Behaviour Change Strategy) identifies the desired behavioural norms which include Adaptability, Innovation, Data Intelligence, Sense Making, Cross Group Collaboration, Continuous Learning and Empathy and Compassion as our core values. The enabling of leaders, through Values Based Leadership Development Programme (VBLDP), webinars, toolkits and coaching, aims to provide them with the ability and clarity on how to make the necessary changes to become more citizen centric, which also aligns with the identified Provincial Strategic Goals.
- 2.3 In March 2021, Provincial Cabinet ("Cabinet") and Provincial Top Management ("PTM") have signed off on the WCG Behaviour Change Strategy for the WCG Culture Journey to drive system changes. The WCG Culture Journey has a few key interventions that form part of its current implementation phase, namely, Enabling of Leaders, WCG Values Conversations, PM Practice Alignment, Culture Bootcamp and Measurement. The "Enabling of Leaders" is the foundational intervention that drives leadership excellence and provides a demonstration of the WGG's vision of becoming a government that is trusted by the people we serve.
- 2.4 Research has indicated that coaching has the ability to influence perceptions of change and the behaviours toward it given the impact coaching has on the emotions experienced during times of change. However, the coaching needed in the WCG at present is slightly different. System Coaches unlock the potential of any leader to enable them to maximize their overall performance and their organisations. As such, it is focused on helping an individual leader to achieve his/her full potential. System Coaching is the most effective approach to aligning individuals – through the teams they work in – to the organisation they work for. Systemic Coaching has its roots in the principles of Organisational Development, where the individual self is viewed in relation to others around that individual, and in relation to the larger organisational or institutional ecosystem that the individual and others belong to. In a systemic approach, ideally, both the individual, and the group the individual belongs to, should be coached to bring them into alignment with each other, as well as the ecosystem.
- 2.5 To capacitate our leaders to navigate the realities of the new ways of work, to create optimal working environments and to enable them to adapt to change, the leaders of the WCG need support to grow their Emotional Intelligence and maturity. The System Coaching Programme will bolster the "Enabling leaders change interventions" by offering

strategic support to top leadership (i.e., Heads of Departments and Provincial Ministers of the WCG) to embody the changes that must be embedded throughout the organisational system. Leadership will then be able to serve as role models and act as change agents to inspire others within WCG to make the necessary behavioural changes so as to create a positive employee experience.

- 2.6 In executing the services as contemplated in these Terms of Reference, System Coaches are expected to propel effective service delivery by enabling leaders to embody citizen-centricity and the desired behavioural norms. This expectation is based on research which illustrates that coaches are skilled professionals who affect powerful change in leaders by guiding and supporting them through change while enabling them to self-reflect, grow and strategise the way forward. System Coaching will not only help leaders play their role towards achieving successful change but will also offer valuable information to the other change programmes of the WCG to assist in identifying any inhibiting factors within the organisation which may affect positive change. The appointed System Coaches and WCG leadership will work together to create guidelines in respect of the system changes that are required to attain the new WCG way of working.

### **3. SCOPE OF SERVICES / DELIVERABLES**

- 3.1 In order to enable leaders to embody and exemplify the vision and aspirational culture, a System Coaching Programme has been identified. As such, the WCG requires the services of a service provider that is able to assist DOTP in developing and executing a System Coaching Programme to effect the changes required in the organisation, as described above (and further described below).
- 3.2 To deliver the System Coaching services, the successful bidder must, *inter alia*:
- 3.2.1 assign skilled and experienced System Coaching practitioners to the leadership of the WCG (being the \*Heads of Department and the WCG's Provincial Ministers, also referred to herein as "Coachees");
  - 3.2.2 design and develop e-learning training content; and
  - 3.2.3 if required, provide access to training through an e-learning platform [In this regard, please ensure that the details of the appropriate training toolset(s) / e-learning platforms, including pricing, to deliver the System Coaching services are included in the proposal].

*\*Please note: The DOTP reserves the right to request the successful bidder to provide the required services to other Senior Management officials (from level 13 and above). The delivery of System Coaching services to such officials are dependent upon and subject to*

*the available budget, business requirements and prior written approval of DOTP in accordance with any prevailing procurement prescripts.*

3.3 The key deliverables / service components required from the successful bidder in the execution of intended System Coaching services, are listed below:

- 3.3.1 Alignment and Planning workshop with internal team (not including the intended Coachees);
- 3.3.2 Development of System Coaching Programme Plan;
- 3.3.3 Development of Individual and Group Theme reports templates;
- 3.3.4 Leadership group sessions in person or virtual to be facilitated by 2 (two) Managing System Coaches/ System Coaches depending on the need of the leadership group / Coachees;
- 3.3.5 Individual (one-on-one) coaching sessions between the System Coaches (including the Managing System Coaches) and the Coachees. Initially, all one-on-one coaching sessions must be held in person, whereafter virtual sessions may be held once a rapport has been established between the respective System Coach and Coachee. Virtual coaching sessions must be agreed to between the Coach and Coachee concerned, with the final decision being that of the Coachee;
- 3.3.6 In person observation sessions of "leadership in context" by all System Coaches (including the Managing System Coaches);
- 3.3.7 Generation of individual reports, which must include individual action / development plans by each Systems Coach (including Managing System Coaches);
- 3.3.8 Generation of group theme report by Managing System Coaches with inputs from System Coaches;
- 3.3.9 Access to web-based platform (administered by the successful bidder for 360 degree assessments, to be based on a questionnaire that will be provided to the successful bidder by the Chief Directorate: Organisation Development of the DOTP & drawing of subsequent reports to be provided to DOTP; *[Please note: (i) Reports must provide an overview of strengths, weaknesses and behavioural blindspots; (ii) Provision must be made for multiple raters, with a minimum of 6 raters, including self-evaluation.]*
- 3.3.10 Design and Development of content / modules that enables culture competencies (Some examples of possible culture competencies are we may require training on: Adaptability, Innovation and creativity, Agile thinking, Cross

group collaboration, Data intelligence/ sense making, Coping with uncertainty and Listening);

3.3.11 Access to an interactive e-learning platform, administration and managed by the successful bidder, providing Coachees access to an active and blended learning environment that will lead to high completion rates, long-term knowledge retention and effective skills development; and

3.3.12 Transferring/ Loading of the culture competencies modules to the e-learning content and e-learning platform.

*Please Note: Paragraphs 3.3.10 – 3.3.12 are dependent on group needs and budget availability. As such, these services will be used on an "as and when required" basis and are dependent upon and subject to the available budget, requirements and written approval of the DOTP.*

3.4 The DOTP proposes the below System Coaching Programme Plan (i.e., draft Programme Plan) for the successful execution of the System Coaching services (i.e., to observe the culture and leadership behaviour to date, and introduce and encourage changes, where necessary, to equip leaders to become citizen-centric and provide feedback in respect of the impact of the suggested changes). The final System Coaching Programme Plan will be agreed to between the parties during the planning phase as described below.

Planning phase	
1.	Information Session for onboarding and creating context of the culture journey and leadership development to date.
2.	Initiating discussions regarding the terms and conditions of the Service Level Agreement as contemplated in paragraph 5.1.17 below.
3.	Planning and Alignment Workshop – development of the System Coaching Programme Plan to be developed and facilitated by Project Manager with support from the 2 (two) Managing System Coaches.
Stage 1: Progress	
1.	Leadership Group session (not exceeding 3 hours): To introduce the System Coaching Programme and System Coaches, as facilitated by the 2 (two) Managing System Coaches.
2.	Pairing of System Coaches and to the 24 (twenty-four) identified leaders / Coachees (coordinated by the Project Manager). Please note, the two Managing System Coaches will also conduct one-on-one System Coaching sessions. It is anticipated that each System Coach (including the Managing System Coaches) will be paired with two Coachees.
3.	2 (two) Managing System Coaches develop individual and group theme report templates.
4.	Utilisation of a Web-based Platform for 360 degree assessments (minimum of 6 raters per Coachee – questionnaire already developed and to be utilised), which process must be coordinated by the Project Manager.

5.	24 (Twenty-four) Individual coaching sessions with leaders / Coachees (not exceeding 90 minutes each) utilising all System Coaches (including Managing System Coaches).
6.	2 (two) Managing System Coaches develop group theme report with inputs from System Coaches.
7.	Coaches observe "leaders in context" to gain insights on context and behaviours (a minimum of 3 observation sessions per Coachee, with each session not exceeding 3 hours).
8.	Each System Coach develops individual feedback report per Coachee, including an individual action / development plan and submit to the Coachee.
9.	24 (twenty-four)* Individual coaching sessions to discuss individual feedback reports.
10.	2 (two) Managing System Coaches develop group theme report with System Coaches' inputs.
11.	Leadership group session (not exceeding 3 hours): To discuss group themes, as facilitated by the 2 (two) Managing System Coaches.
<b>Stage 2: Impact</b>	
1.	Leadership Group session (not exceeding 3 hours), check in and positioning will be facilitated by the 2 (two) Managing System Coaches.
2.	24 (twenty-four)* Individual coaching sessions with leaders (not exceeding 90 minutes each).
3.	2 (two) Managing System Coaches develop group theme report with inputs from System Coaches.
4.	Coaches observe leaders / Coachees in context to gain insights on context and behaviours (a minimum of 3 observation sessions per leader, each session not exceeding 3 hours).
5.	Utilisation of Web-based Platform for 360 degree assessments (minimum of 6 raters per Coachee – questionnaire already developed and to be utilised), which process must be coordinated by the Project Manager.
6.	Each System Coach develops individual feedback report per Coachee, including an individual action / development plan, and submit to Coachee.
7.	24 (Twenty-four)* Individual coaching sessions to discuss individual feedback reports.
8.	2 (two) Managing System Coaches develop group theme reports with inputs from System Coaches.
9.	Leadership group session (not exceeding 3 hours): To discuss group themes, as facilitated by the 2 (two) Managing System Coaches.

*\*The number of coaching sessions will be dependent on the number of Coachees participating in the project.*

### 3.5 Resource Roles

3.5.1 In order to deliver the System Coaching Programme identified above), the DOTP requires a Project Manager, Managing System Coaches (each with 7 years' experience in executive coaching) and System Coaches (each with a minimum of 5 years' experience in executive coaching).

3.5.2 For the purposes of evaluating bids only, the DOTP has determined the minimum number of resources as follows:

No	Resource Role	Minimum Number of Resources
1.	Project Manager	1
2.	Managing System Coaches	2
3	System Coaches	10

Each bid must ensure that it provides for the minimum number of resources per resource role.

3.5.3 The minimum number of resources specified above does not constitute a guarantee that such number will be required by the DOTP. The number of resources and extent to which the deliverables, as specified in paragraph 3, will be utilised is dependent on the available budget, business requirements and applicable timeframes of the DOTP. The purpose of the contract contemplated herein is to provide for flexibility to respond to business demands (i.e., numbers may be adjusted both up and down). **Resources will be appointed for a specific period as determined by the System Coaching Programme Plan.** All changes of requirements for resources and services, with relevant timeframes, will be recorded in writing and agreed by both parties.

### 3.6 Resource Competencies (Skills and Experience Requirements)

The below table provides a description of each resource role identified above and sets out the minimum standards and experience required of resources to fulfil the resource roles described.

Roles	Description	Minimum competencies
Project Manager	<p>The role of the Project Manager encompasses the following activities within the scope of the relevant services:</p> <ul style="list-style-type: none"> <li>- Coordinate System Coaching Programme plan;</li> <li>- Coordinate and facilitate allocation of System Coaches to each of the 24 (twenty-four) Coachees;</li> </ul>	- A minimum of 5 years' Project Management experience, inclusive of experience in managing Leadership development or Culture Change projects.



	<ul style="list-style-type: none"> <li>- Coordinate, facilitate and schedule coaching and observation sessions;</li> <li>- Manage the team of System Coaches;</li> <li>- Schedule and run internal project meetings to be attended by representatives from the Chief Directorate: Organisation Development of the DOTP for purposes of monitoring the progress in the implementation of the deliverables;</li> <li>- Design, develop and facilitate a Planning and Alignment Workshop as referred to in paragraphs 3.3 and 3.4 above;</li> <li>- Develop the System Coaching Programme Plan;</li> <li>- Coordination and inputs to group theme reports;</li> <li>- Liaise with representatives from the Chief Directorate: Organisation Development of the DOTP and leadership of the WCG;</li> <li>- Manage project deliverable execution;</li> <li>- Manage implementation and reporting on deliverables (at least on a monthly basis and as and when required);</li> <li>- Manage administrative and logistical requirements of project implementation i.e., dates for individual and group sessions, submission of deliverables and arrangement of project meetings).</li> </ul>	
Managing System Coaches	The role of the Managing System Coaches encompasses the following activities within the scope of the relevant services:	<ul style="list-style-type: none"> <li>- A minimum of 5 years combined executive management development or culture transformation experience in private (Blue chip Corporate at an Executive level) and public sector (Top</li> </ul>

	<ul style="list-style-type: none"> <li>- Support Project Manager to design, develop and facilitate a Planning and Alignment Workshop as referred to in paragraphs 3.3 and 3.4 above;</li> <li>- Development of individual and group theme report templates;</li> <li>- Design, develop and facilitate Leadership group sessions to engage on findings and process or team coaching;</li> <li>- Conduct one-on-one coaching sessions with leadership / Coachees;</li> <li>- Conduct in-person observation sessions of "leadership in context";</li> <li>- Develop individual reports, including action / development plans;</li> <li>- Develop group theme reports with inputs from System Coaches;</li> <li>- Provide support to leaders / Coachees to implement action / development plans for behavioural change;</li> <li>- Quality assure System Coaches approach and individual reports;</li> <li>- Manage complaints from leaders / Coachees with regard to System Coaches; and</li> <li>- Attend project meetings.</li> </ul>	<p>management – Chief Director to Head of Departments, Head of Ministry, Members of Parliament), with a minimum of one project <b>completed in the public sector</b>.</p> <ul style="list-style-type: none"> <li>- 7 years' combined experience in executive coaching in private and public sector, with a minimum of one project completed in the public sector and at least one executive coaching project aimed at organisational culture change outcomes.</li> <li>- A post graduate coaching qualification (such as a Professional Certified Coach (PCC) or a Master Certified Coach (MCC)) or NQF level 9 master's degree required in one of the following fields: <ul style="list-style-type: none"> <li>• Culture Transformation;</li> <li>• Leadership Development;</li> <li>• Management Coaching;</li> <li>• (Business, Executive and / or Leadership) Coaching;</li> <li>• Emotional Intelligence; or</li> <li>• Neuro-Linguistic Programming.</li> </ul> </li> </ul> <p>[Please note: Qualifications are required to ensure technical competence and level of technical engagement.]</p> <ul style="list-style-type: none"> <li>- A registration of membership with one or more of the following Professional Coaching Bodies: <ul style="list-style-type: none"> <li>• Coaches and Mentors of South Africa (COMENSA);</li> <li>• International Coaching Federation (ICF); or</li> <li>• European Mentoring and Coaching Council.</li> </ul> </li> </ul> <p><u>[Please note: Managing System Coaches are required to have a qualification <b>and</b></u></p>
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		<p>registration of membership with a professional coaching body as described above.</p> <p>With regard to the registration of membership with a Professional Coaching Body, evidence will be accepted in the form of a certificate, registration card, official letter from the board, official board / association registry – if the information is on a website a print-out from the website is required and attached to the CV of the Managing System Coach.]</p> <ul style="list-style-type: none"> <li>- A minimum of 1 (one) year's training in or applied practice of: <ul style="list-style-type: none"> <li>• Emotional Intelligence;</li> <li>• Neuro / Brain functioning theory; and</li> <li>• Systems thinking methodology.</li> </ul> </li> <li>- An Integrative Enneagram professional practitioner certificate from a trainer accredited by Integrative Enneagram Solutions CC (current valid membership is required).</li> </ul>
System Coaches	<p>The role of the System Coaches encompasses the following activities within the scope of the relevant services:</p> <ul style="list-style-type: none"> <li>- One-on-one coaching sessions with leaders / Coachees;</li> <li>- Conduct in-person observation sessions of "leadership in context";</li> <li>- Develop individual reports including action plans;</li> <li>- Give inputs to Managing System Coaches for group theme reports;</li> <li>- Design, develop and facilitate Leadership group sessions to engage on findings and process or team coaching (if required);</li> <li>- Provide support to leaders / Coachees to implement action / development plans for behavioural</li> </ul>	<ul style="list-style-type: none"> <li>- A minimum of 5 years combined executive management development and culture transformation experience in private (Blue chip Corporate at an Executive level) and public sector (Top management – Chief Director to Head of Departments, Head of ministry, Members of parliament), with a minimum of one project in public sector;</li> <li>- Minimum of 5 years' combined experience in executive coaching in private and public sector, with a minimum of one project completed in public sector;</li> <li>- A post graduate coaching qualification (such as a PCC or MCC) or NQF level 9 master's degree required in one of the following fields:</li> </ul>

	<p>change; and</p> <ul style="list-style-type: none"> <li>- Attend project meetings.</li> </ul>	<ul style="list-style-type: none"> <li>• Culture Transformation;</li> <li>• Leadership Development;</li> <li>• Management Coaching;</li> <li>• (Business, Executive and / or Leadership) Coaching;</li> <li>• Emotional Intelligence; or</li> <li>• Neuro-Linguistic Programming,  <i>[Please note: Qualifications are required to ensure technical competence and level of technical engagement.];</i></li> </ul> <p><b>ALTERNATIVELY</b></p> <ul style="list-style-type: none"> <li>- A registration of membership with one or more of the following Professional Coaching Bodies: <ul style="list-style-type: none"> <li>• Coaches and Mentors of South Africa (COMENSA);</li> <li>• International Coaching Federation (ICF); or</li> <li>• European Mentoring and Coaching Council;</li> </ul> </li> </ul> <p><b><u>Please note:</u></b> System Coaches are required to have <b><u>either</u></b> a qualification <b><u>or</u></b> registration of membership with a professional coaching body as described above.</p> <p><i>With regard to the registration of membership with a Professional Coaching Body, evidence will be accepted in the form of a certificate, registration card, official letter from the board, official board/ association registry – if the information is on a website a print-out from the website is required and attached to the CV of the System Coach.]</i></p> <ul style="list-style-type: none"> <li>- A minimum of 1 (one) year's training or applied practice of: <ul style="list-style-type: none"> <li>• Emotional Intelligence;</li> <li>• Neuro / Brain functioning theory; and</li> <li>• Systems thinking methodology; and</li> </ul> </li> <li>- A minimum of 3 (three) System Coaches must be trained and have an Integrative</li> </ul>
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		Enneagram professional practitioner certificate from a trainer accredited by Integrative Enneagram Solutions CC (current valid membership is required).
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#### 4. PHASE 1(A): COMPULSORY CONDITIONS OF BID

- 4.1. Refer to paragraph 7 read with Annexure C for an explanation of the Bid Evaluation process, submission instructions, and a checklist of the required documents to be included in any submission.
- 4.2. Each bidder must indicate with an **"X"** in **Table 1** below whether it complies with the compulsory conditions of the bid (to the extent that these are applicable to the bidder). The bidder refers to the bidding company / firm and not the individual coaches who might be associates / employees of the bidding company / firm. Bid documentation must be supported with the relevant evidence set out for each of the requirements indicated in **Table 1** below. In the event that a bidder fails to indicate with an **"X"** whether it complies with the compulsory conditions of the bid set out in **Table 1** below, it will be assumed, unless the bid documents indicate otherwise, that the bidder does not comply with the compulsory conditions of the bid set out in **Table 1** below. Unless otherwise indicated in Table 1 below, any bidder that does not comply with the compulsory conditions of bid applicable to its bid, and/or **any bidder that does not provide the evidence requested below in respect of its bid, will not proceed to the evaluation phase** of this tender process.

**Table 1: Compulsory Conditions of Bid**

No	Compulsory Conditions of Bid	Compliance		
		Comply	Do Not Comply	Not Applicable
4.2.1	Each bidder must be <b>duly registered on the Central Supplier Database (CSD)</b> . DOTP shall verify such registration prior to evaluation of each bid. <b>CSD report to be attached.</b> To be included in the Bid Proposal (Envelope 1).			
4.2.2	Each bid must contain a duly completed and signed <b>WCBD 1 form (Invitation to Bid form)</b> . All information and documentation requested in the form must be provided. No WCBD 1 forms (including all information and documentation required in terms thereof) will be			

No	Compulsory Conditions of Bid	Compliance		
		Comply	Do Not Comply	Not Applicable
	<p>accepted after the closing date and time of the bid. The WCBD 1 form (including all information and documentation required in terms thereof) must be included in the envelope containing the bidder's Bid Proposal (Envelope 1).</p> <p>Bidders are reminded that WCBD 1 form requires proof of authority and as such must ensure that proof is accordingly provided. Failure to provide proof of authority may render the bid invalid.</p>			
4.2.3	<p>Each bid must contain a duly completed and signed <b>WCBD 4 form (Declaration of Interest, Declaration of Bidder's Past Supply Chain Management Practices and Certificate of Independent Bid Determination)</b>. All information and documentation requested in such form must be provided. No WCBD 4 form (including all information and documentation required in terms thereof) will be accepted after the closing date and time for the submissions of bids. The WCBD 4 form (including all information and documentation required in terms thereof) must be included in the envelope containing the bidder's Bid Proposal (Envelope 1). In the event that no WCBD 4 form (together with the information and documentation required in terms thereof) is included in a bid, DOTP will check the Western Cape Supplier Evidence Bank for a <b>valid</b> copy of such form. In the event that (i) the bidder does not submit a duly completed, signed and dated WCBD 4 form (together with the information and documentation required in terms thereof); or (ii) no such duly completed and valid form (together with the information and documentation required in terms thereof) are available to DOTP on the Western Cape Supplier Evidence Bank, the bid in question will be non-compliant with this compulsory condition of bid and will be disqualified.</p>			
4.2.4	Where the bidder intends to claim preferential procurement points for <b>B-BBEE</b> , each bid must contain			

No	Compulsory Conditions of Bid	Compliance		
		Comply	Do Not Comply	Not Applicable
	<p>a duly completed and signed <b>WCBD 6.1 form (Preference Points Claim Form in terms of the Preferential Procurement Regulations, 2022)</b>. In such case, all information and documentation requested in such form must be provided. No WCBD 6.1 form (including all information and documentation required in terms thereof) will be accepted after the closing date and time for the submission of bids. The WCBD 6.1 form (including all information and documentation required in terms thereof) must be included in the envelope containing the bidder's Bid Proposal (Envelope 1). In the event that a bidder does not submit a duly completed WCBD 6.1 form (including all information and documentation required in terms thereof), the bidder will not for this reason alone be disqualified from having its bid evaluated but it will be assumed that the bidder does not intend to claim any preferential procurement points for B-BBEE.</p>			
4.2.5	<p><b>Where applicable</b>, any bid submitted by a <b>consortium or joint venture</b> of two or more firms must be accompanied by a copy of the consortium formation document or joint venture agreement, as applicable, which sets forth the precise responsibilities of each of the parties thereto. Consortia and joint venture members are advised that each member will be held jointly and severally liable for the performance of the consortium or joint venture in terms of the contract contemplated herein. Where a bid is submitted by a consortium or joint venture of two or more firms, please ensure that:</p> <ul style="list-style-type: none"> <li>The joint venture agreement or consortium formation document submitted as part of the bid makes it unambiguously clear that the arrangement between the member firms is either a joint venture or a consortium (as the case may be) and is not a sub-contracting arrangement;</li> </ul>			

No	Compulsory Conditions of Bid	Compliance		
		Comply	Do Not Comply	Not Applicable
	<ul style="list-style-type: none"> <li>All standard bidding forms are appropriately completed (i.e., WCBD 1 to be completed in the name joint venture / consortium, WCBD 4 must be completed for each member firm of the name joint venture / consortium and WCBD 6.1 in the name joint venture / consortium);</li> <li><b>A trust, consortium or joint venture (including unincorporated consortia and joint ventures) must submit a consolidated B-BBEE Status Level Verification Certificate for every separate tender;</b> and</li> <li>Each member firm must be registered on the CSD for joint ventures and consortiums.</li> </ul> <p>Failure by a bidder, being <b>consortium or joint venture</b> of two or more firms, to adhere to these requirements shall disqualify the bid submitted by the member firms of the bidder.</p> <p>No copies of a consortium formation document or joint venture agreement will be accepted after the closing date and time of the bid.</p> <p>The WCG reserves the right to request a preferred bidder that is a consortium or joint venture to provide the following prior to the making of the award: (a) a certified copy of such document or agreement duly certified by a Commissioner of Oaths (where the consortium or joint venture is based in South Africa); or (b) an authenticated copy of such document or agreement duly authenticated by a Notary Public (where the consortium or joint venture is based outside of South Africa).</p> <p>Failure by a preferred bidder to provide same within a period stipulated by the WCG shall disqualify the bid submitted by that preferred bidder.</p>			



No	Compulsory Conditions of Bid	Compliance		
		Comply	Do Not Comply	Not Applicable
	<p>All WCBD forms provided by a consortium or joint venture must be completed in a manner that makes it clear that the bidder is a consortium or joint venture. The WCG reserves the right to request clarity in this regard on the WCBD forms provided by a consortium or joint venture.</p> <p><b>The documents as required by this paragraph 4.2.5 must be included in the envelope containing the bidder's Bid Proposal (Envelope 1).</b></p>			
4.2.6	<p>Each bid must contain a list of resources that conforms in all material respects to the resource matrix set out in <b>Annexure D</b> and that is responsive to the requirements set out in paragraph 3.6, read with paragraph 3.5, above. To demonstrate the bidder's capability to start from the commencement date of the contract, all resources required to deliver the required services as per the scope of service and deliverables set out in paragraphs 3.3 and 3.4, read with paragraph 3.6, above must be listed in <b>Annexure D</b>. Annexure D may not include the same resource for more than one resource role. This list must be accompanied by 1 (one) detailed Curriculum Vitae (CV) for each resource role cited in <b>Annexure D</b>, including certified copies of all qualifications. Each CV must at least demonstrate the following for each resource role (as specified in paragraph 3.6 above):</p> <ul style="list-style-type: none"> <li>- The resource concerned has the <b>relevant competencies and experience</b> as indicated for the relevant role in <b>paragraph 3.6</b> above; and</li> <li>- The resource concerned has the <b>relevant qualifications</b> as indicated for the relevant role in <b>paragraph 3.6</b> (i.e., the column of the table included in <b>paragraph 3.6</b> entitled "Minimum Competencies").</li> </ul> <p>In the event that Annexure D is not fully completed and / or the information and documentation required in terms thereof is not included in the CVs provided,</p>			

No	Compulsory Conditions of Bid	Compliance		
		Comply	Do Not Comply	Not Applicable
	<p>DOTP will check the remainder of the bid document for the information and documentation. In the event that no such information and documentation are available to DOTP as part of the bidding documents submitted by a bidder, the bidder in question will be non-compliant with this compulsory condition of bid and be disqualified.</p> <p>The above information and documentation to be included in the Bid Proposal (Envelope 1).</p>			
4.2.7	<p>Each bidder must demonstrate in its bid that it has proven experience in delivering similar programmes /Executive Coaching programmes / Culture Transformation programmes / System Coaching programmes / Executive Management Development programmes services in the past (referring to work done from 2010 to present) by providing the following with its bid documents:</p> <p>(i) A <b>minimum of 3 (three) contactable references</b> using the Contactable References List template, attached hereto as <b>Annexure E</b>, which references must be able to provide information on relevant services undertaken by the bidder concerned in the past; <u>and</u></p> <p>(ii) An <b>original reference letter from each contactable reference that is cited in Annexure E</b> that details in full the matters as set out (provided on an official business letterhead signed by an authorised representative at management level, which <b>reference letter may not be older than 12 months</b>); <u>or</u></p> <p>(iii) <b>In the absence of an original reference letter for each contactable reference that is cited in Annexure E, a sworn affidavit deposed to by an authorised representative of the bidder concerned (in the format set out in Annexure F hereto) for each contactable reference that does not or cannot provide an original reference letter, which</b></p>			

No	Compulsory Conditions of Bid	Compliance		
		Comply	Do Not Comply	Not Applicable
	<p>sworn affidavit must comply with the requirements set below.</p> <p>Each original reference letter or sworn affidavit provided (as the case may be) must at least detail the following in relation to services rendered by the bidder in the past:</p> <ul style="list-style-type: none"> <li>• Scope of services / deliverables</li> <li>• Start date and duration of services</li> <li>• Number of employees of the organisation / enterprise concerned</li> <li>• Resources used (i.e., quantity and description of resources)</li> <li>• Contract status (i.e., Completed / In Progress / Unfinished)</li> <li>• Registered name of enterprise / organisation for which the services were undertaken</li> <li>• Full name of a contact person within that enterprise / organisation</li> <li>• Telephone number and email address for the said contact person</li> <li>• Customer satisfaction level of the enterprise / organisation concerned (i.e. Unsatisfied / Somewhat satisfied / Fully satisfied / Exceeded expectations)</li> </ul> <p>The WCG reserves the right to contact any of these references to verify the information contained in <b>Annexure E</b> and the accompanying original reference letter or sworn affidavit (as the case may be).</p> <p><i>DOTP prefers that bidders allocate a unique reference number (e.g., CR01) to each reference letter and each sworn affidavit provided and include such reference numbers for the corresponding enterprise / organisation in <b>Annexure E</b> so that it is easy to match reference letters and sworn affidavits with</i></p>			

No	Compulsory Conditions of Bid	Compliance		
		Comply	Do Not Comply	Not Applicable
	<p><i>contactable references. No reference letters and sworn affidavits will be accepted after the closing date and time for the submission of bids.</i></p> <p>To be included in the Bid Proposal (Envelope 1).</p>			
4.2.8	<p>Each bid must contain a comprehensive technical proposal that must include at least the following:</p> <ul style="list-style-type: none"> <li>• Company Overview;</li> <li>• A <b>Business Profile</b> must be provided that indicates the <b>nature and the scope of work performed by the bidder in the past</b>, as well as industry experience in rendering service/s where interest was expressed.</li> <li>• A <b>portfolio of evidence containing examples</b> of previous work done (e.g., Executive development, culture transformation work, executive coaching programme executed); and the e-learning platform utilised.</li> </ul> <p>Evidence must include the following:</p> <ul style="list-style-type: none"> <li>- project plan examples;</li> <li>- coaching approach towards achieving change;</li> <li>- individual and group report examples;</li> <li>- project feedback and/or closing report including indication of level of impact achieved; and</li> <li>- in respect of the e-learning platform please include screen shots and descriptions of the e-learning platform functionality and benefits.</li> <li>• Understanding of DOTP Requirements as it relates to the required services described in paragraph 3 above also illustrating how the services are to be delivered;</li> <li>• Experience of the System Coaching Team;</li> <li>• Track record not older than 7 years and relevant experience in delivering the same services in the delivery of a System Coaching Programme contemplated herein; and</li> </ul>			

No	Compulsory Conditions of Bid	Compliance		
		Comply	Do Not Comply	Not Applicable
	<ul style="list-style-type: none"> <li>Any other items the bidder wishes to add.</li> </ul> <p>The comprehensive technical proposal must be included in Envelope 1. The envelope (Envelope 1) must preferably be marked with the name of the bidder and entitled: "Technical Proposal: Bid Number FMA 0006-2023/24". A failure to do so will not disqualify a bidder from having its bid evaluated further; and</p> <p>The envelope (Envelope 1) must contain at least the following:</p> <ul style="list-style-type: none"> <li>The comprehensive technical proposal; and</li> <li>All mandatory documents specified in this Table 1 (i.e., <b>excluding the financial proposal</b> and related documents).</li> </ul>			
4.2.9	<p>Each bid must include a second envelope (Envelope 2), separate to the technical proposal (Envelope 1) referred to above, in which the bidder's financial proposal must be sealed. The bidder's financial proposal will only be evaluated as part of <b>Phase 2</b>. The bidder's financial proposal must be sealed in the said envelope as follows:</p> <ul style="list-style-type: none"> <li>The envelope must preferably be marked with the name of the bidder and entitled: "Financial Proposal: Bid Number FMA 0006-2023/24". A failure to mark the envelope correctly will not disqualify a bidder from having its bid evaluated further; and</li> <li>The envelope must contain a duly completed and signed WCBD 3.3 form (Pricing Schedule) in the format attached hereto.</li> </ul> <p><b>Should a bidder fail to include its financial proposal in a separate envelope (separate from the technical proposal), the bidder shall be disqualified from having its bid evaluated further.</b> Bidders must therefore ensure that DOTP is able to ascertain which envelope contains the bidder's financial proposal.</p>			

4.3. Please note that each bidder, by submitting its bid, hereby confirms that it has the **necessary consent of each resource to provide any of his or her personal information as**

**included as part of such bid.** The reference to “personal information” in this section shall mean “personal information” as defined in the Protection of Personal Information Act, 2013 (Act 4 of 2013). Where the personal information of a resource may not be disclosed at the bidding stage of the tender in question, a bidder may de-identify any information and documentation provided in its bid that constitutes personal information of that resource by doing the following:

- 4.3.1 Allocating a pseudonym for the first name and surname of the resource in question (indicating in the bid documents that such first name and surname are pseudonyms);
  - 4.3.2 Removing personal information concerning the resource in question from the CV provided for that resource; and
  - 4.3.3 Redacting all qualifications and course credentials to be provided in respect of that resource to exclude personal information that could otherwise be used to identify the resource in question; but
  - 4.3.4 Always ensuring that the information and documentation provided as part of the bid are sufficient for the DOTP to evaluate that bid in line with the requirements set out in these Terms of Reference.
- 4.4. The DOTP reserves its right to conduct a due diligence check to verify any material aspect of a bidder's bid prior to the award of the tender.



## 5. PHASE 1 (B) CONDITIONS OF CONTRACT

- 5.1. Each bidder must indicate with an "X" in **Table 2** below if it agrees with the following conditions of contract. **Each bidder must include in its bid a signed and completed copy of Table 2 below (i.e., a completed copy of Table 2 with a signature of an authorised representative of the bidder on each page comprising Table 2).** In the event that a bidder does not or fails to indicate with an "X" whether it agrees with a particular condition of contract set out in Table 2 below, it will be assumed, unless the bid documents indicate otherwise, that the bidder does not agree to the condition of contract concerned. In the event that a bidder submits a completed but unsigned copy of Table 2, DOTP reserves the right to verify with that bidder whether the completed Table 2 was in fact completed by the said bidder (which verification shall be deemed sufficient in lieu of a signed copy of Table 2). **Failure on the part of a bidder to agree to all conditions of contract set out in Table 2 below and to submit as part of its bid proof of its agreement in this regard may lead to disqualification of that bidder's bid.**

**Table 2: Conditions of Contract**

No	Conditions of Contract	Agreement to Conditions	
		Agree	Do Not Agree
5.1.1	<p>The successful bidder must provide for the full scope of services outlined in paragraph 3 including, but not limited to, resources in the following resource roles who meet the minimum competencies set out in paragraph 3.6 above:</p> <ul style="list-style-type: none"> <li>• Project Manager</li> <li>• Managing System Coaches</li> <li>• System Coaches</li> </ul> <p>Only resources listed in <b>Annexure D</b> may fill the corresponding resource roles set out above.</p>		

**The following bidder hereby accepts the conditions of contract as indicated on this page as being agreed:**

**Bidder Name:** \_\_\_\_\_

**Signature of Authorised Representative of the Bidder:**

\_\_\_\_\_



No	Conditions of Contract	Agreement to Conditions	
		Agree	Do Not Agree
5.1.2	The successful bidder must commence with the required services as soon as the award has been made, which services must be completed within a period of twenty-four months, in accordance with the project timetable / System Coaching Programme Plan as agreed to between the bidder and DOTP.		
5.1.3	The System Coaches must be available to fulfil their functions from 07:00 until 22:00, Monday to Friday. There may be requests to operate from 08:00 until 12:00 on Saturdays. As Cabinet, PTM and Senior Management Service (SMS) members do not have fixed working hours, resources must avail themselves according to the schedules of the leadership component. Actual operating hours and scheduling are adjusted according to business demands.		
5.1.4	The resources must be available, when so requested by the DOTP, to attend face-to-face engagements within 24 (twenty-four) hours, during the operating hours set out in clause 5.1.3 above.		
5.1.5	The successful bidder must comply with DOTP branding standards / guidelines of the WCG. As such, the successful bidder must ensure that any content, promotional materials / items used /or supplied in the creative options are in alignment with the WCG Brand and leadership enablement that has occurred. The Corporate Communications Directorate of the DOTP will provide guidance in this regard. Assessments utilised in the System Coaching Programme must be the same as utilised in other programmes to ensure consistency of indicators. Therefore, the successful bidder's System Coaching team must attend an information session to understand the context and leadership programme informing the system coaching plan for the leadership group at the inception of the contract.		
5.1.6	The Bidder's resources may be subjected to vetting and security clearances by the State Security Agency, where required (to be arranged by the DOTP).		

**The following bidder hereby accepts the conditions of contract as indicated on this page as being agreed:**

**Bidder Name:** \_\_\_\_\_

**Signature of Authorised Representative of the Bidder:**

\_\_\_\_\_

No	Conditions of Contract	Agreement to Conditions	
		Agree	Do Not Agree
5.1.7	The Bidder must ensure confidentiality in respect of all services rendered to the DOTP during and after contract completion. To this end, the successful bidder, together with its resources who are designated to provide the required services contemplated herein, must sign a confidentiality and non-disclosure agreement, as well as complete and submit a declaration of interest (as provided by the DOTP) on commencement of the services and annually thereafter. Should changes in conflict of interest occur during a year, such changes must be declared immediately.		
5.1.8	The successful bidder must provide all required reports, presentations and information contemplated herein, timeously over the contract period. The cost of providing such reports, presentations and information must be included in the quoted service rates.		
5.1.9	In the event that the successful bidder is a consortium or joint venture, each member of such consortium or joint venture (as the case may be) shall be held jointly and severally liable for the performance of the consortium or joint venture in terms of the contract contemplated herein.		
5.1.10	<p>DOTP shall review the Bidder's performance in terms of the provisions of the contract, read with the terms and conditions set out herein. The Performance Management review will include, but is not limited to, the following factors:</p> <ul style="list-style-type: none"> <li>- Contract Management and Administration: <ul style="list-style-type: none"> <li>• Attendance at 90% of all contract management meetings scheduled monthly or as required; and</li> <li>• Timely submission of correct invoices on a monthly basis, with relevant supporting documents including, but not limited to, time sheets / attendance registers.</li> </ul> </li> </ul>		

**The following bidder hereby accepts the conditions of contract as indicated on this page as being agreed:**

**Bidder Name:** \_\_\_\_\_

**Signature of Authorised Representative of the Bidder:**

\_\_\_\_\_

No	Conditions of Contract	Agreement to Conditions	
		Agree	Do Not Agree
	<ul style="list-style-type: none"> <li>- Service Delivery: <ul style="list-style-type: none"> <li>• Ability to provide the relevant resources, meeting the minimum requirements as specified in paragraph 3.6, at the quantities requested and within the agreed timeframes; and</li> <li>• Ability to deliver the services in accordance with provisions of the contract read with the terms and conditions set out herein.</li> </ul> </li> </ul>		
5.1.11	<p><b>Scalability of Resources</b></p> <p>The DOTP reserves the right to increase or decrease the number of resources required in line with actual operational demand. A minimum period of 28 calendar days' notice will be given for increases in resourcing levels. A minimum period of 14 calendar days' notice will be given for decreases in resourcing levels.</p>		
5.1.12	<p>In the event that (i) the services of an original resource listed in <b>Annexure D</b> is terminated by the successful bidder for whatever reason; or (ii) the services of an additional resource is required (additional to the resources listed in the Resource Matrix – Annexure D), the successful bidder shall ensure that the replacement / additional resource meets the minimum competencies applicable to the skill level and role concerned (as stipulated in paragraph 3.6 above) is provided to ensure the services are delivered in accordance with the requirements of paragraph 3. It will be at the discretion of the DOTP whether a replacement / additional resource will be accepted. The resource matrix (Annexure D) must always be kept up to date.</p>		

The following bidder hereby accepts the conditions of contract as indicated on this page as being agreed:

Bidder Name: \_\_\_\_\_

Signature of Authorised Representative of the Bidder:

\_\_\_\_\_

No	Conditions of Contract	Agreement to Conditions	
		Agree	Do Not Agree
5.1.13	The services contemplated herein shall be provided subject to the availability of funds, depending on the needs and operational requirements of the DOTP and only in accordance with the terms and conditions set out above. There is therefore no guarantee provided by DOTP on the volume of services it will request during the term of the contract contemplated herein.		
5.1.14	The DOTP reserves the right to terminate the contract contemplated herein or any part thereof at its discretion for any reason whatsoever upon 3 (three) months' written notice to the successful bidder, or immediately should it come to the attention of the DOTP that the successful bidder has previously, or during the bidding for this tender, abused the WCG Supply Chain Management System.		
5.1.15	The DOTP will not be liable for any relocation of staff, offices, assets or materials required by the successful bidder in giving effect to the requirements of the contract, nor shall the DOTP be liable for any disbursement costs that the Bidder and its employees, agents, representatives and/or resources may incur in giving effect to the requirements of the contract.		
5.1.16	Each party retains its rights in its pre-existing intellectual property. The WCG shall have all right, title and interest in any intellectual property generated during the course of performing the services outlined herein, including, but not limited to, datasheets, data sets and databases, surveys, content of e-learning training modules, analysis and reports. The successful bidder may not reproduce or use any of such intellectual property and/or any intellectual property of the WCG made available to the successful bidder without the prior written permission of the DOTP.		

**The following bidder hereby accepts the conditions of contract as indicated on this page as being agreed:**

**Bidder Name:** \_\_\_\_\_

**Signature of Authorised Representative of the Bidder:**

\_\_\_\_\_

No	Conditions of Contract	Agreement to Conditions	
		Agree	Do Not Agree
5.1.17	The successful bidder must enter into a Service Level Agreement (SLA) with DOTP, which Service Level Agreement shall, subject to the terms and conditions set out herein, specify agreed key performance indicators, along with an indication on how the successful bidder's performance in terms of the said contract will be monitored, assessed, measured, reported on and discussed at regular scheduled meetings. The Service Level Agreement may be reviewed where necessary and appropriate.		
5.1.18	The DOTP shall pay for the services contemplated herein on a monthly basis after such services have been rendered to the satisfaction of the DOTP, within 30 (thirty) calendar days of receipt of a valid tax invoice from the successful bidder. The amounts payable will be in accordance with the all-inclusive fixed service rates quoted in the pricing schedule (WCBD 3.3) as approved, which service rates may be increased annually in accordance with paragraph 6.4 below.		
5.1.19	The DOTP shall not be liable for any costs related to subsistence, travel, parking, accommodation, car hire, flights, printing, administrative costs and the like incurred by the successful bidder in the provision of the required services. The DOTP will furthermore not be liable for any relocation of staff, offices or assets required by the successful bidder in giving effect to the requirements of the contract.		
5.1.20	The successful bidder shall be bound by the General Conditions of Contract issued by the National Treasury ("the GCC"), read with the terms and conditions set out herein and to the exclusion of any standard terms and conditions that the Bidder would ordinarily impose on its clients.  Any terms and conditions that are not included herein or in the GCC but which the Bidder requires to be included in the contract between it and the DOTP may, with the agreement of the DOTP, be included in the Service Level Agreement referred to below.		

**The following bidder hereby accepts the conditions of contract as indicated on this page as being agreed:**

**Bidder Name:** \_\_\_\_\_

**Signature of Authorised Representative of the Bidder:**

\_\_\_\_\_

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No	Conditions of Contract	Agreement to Conditions	
		Agree	Do Not Agree
5.1.21	The bidder must, at all times during the term of the contract, comply with and work within all legislation, regulations, policies and frameworks applicable to the DOTP (including, but not limited to, the Minimum Information Security Standards (MISS), the Public Finance Management Act (PFMA), the Protection of Personal Information Act (POPIA), and the Promotion of Access to Information Act (PAIA)). The cost of compliance with such legislation, regulations, policies and frameworks must be included in the agreed resource rates.		

**The following bidder hereby accepts the conditions of contract as indicated on this page as being agreed:**

**Bidder Name:** \_\_\_\_\_

**Signature of Authorised Representative of the Bidder:**

\_\_\_\_\_



## 6. PRICING

Bidders must take note of the following:

- 6.1 Each bid must contain a quote for the required services, which must be provided on and, in the format, set out in the **WCBD 3.3 form (Pricing Schedule)** attached hereto.
- 6.2 Bidders must ensure that all rates quoted in their bid documentation are all-inclusive fixed service rates payable in respect of each item / category of service for Year 1.
- 6.3 The **total** combined indicative price quoted for Year 1 is used for evaluation and adjudication purpose only and does not reflect the total contract value for Year 1.
- 6.4 Subject to the terms and conditions set out herein, the all-inclusive amounts quoted in the WCBD 3.3 form (Pricing Schedule) per line item may be increased annually for Year 2 on the anniversary of the commencement date of the relevant contract at an amount not more than the applicable official Consumer Price Index (CPIX) rate determined by Statistics South Africa for the relevant anniversary month. The successful bidder will have to apply for this increase on an annual basis, as it is subject to the prior written approval of the DOTP.
- 6.5 Management, presentation and handover fees to be included in the service rates. No separate costs for management, presentation and handover may be quoted for.
- 6.6 Please note that the services referred to in paragraphs 3.3.10 – 3.3.12 will be provided on an “as and when required” basis and are dependent upon and subject to the available budget, requirements and written approval of the DOTP.
- 6.7 Please note, the number and nature of requests that will be made by DOTP are dependent upon and subject to the available budget, requirements and written approval of the DOTP. No commitments or guarantees are placed on the number and nature of requests that will be made by DOTP for the provision of services contemplated herein.
- 6.8 The resource quantities below are the minimum number of resources required per resource role for evaluation and adjudication purposes only and represent a typical mix of resources in a team. Actual resource quantities required are unknown and subject to actual DOTP demand, and the bidder should not infer any minimum number of resources to be provided.
  - 1 X Project Manager



- 2 X Managing System Coaches
- 10 X System Coaches

6.9 It is to be noted that the DOTP financial year runs from 01 April – 31 March.

6.10 All amounts quoted must include VAT and will therefore be deemed to be VAT inclusive.

## 7. BID EVALUATION

7.1 Please note that a two-envelope system will be utilised for this tender.

7.1.1 The **first envelope** must contain the **Technical Proposal**, together with the completed bidding documents (WCBD 1, WCBD 4 and WCBD 6.1) and other documents specified and completed in accordance with the requirements of Table 1 above.

7.1.2 The **second envelope** must contain the **Financial Proposal** in the form of a duly completed and signed **WCBD 3.3 (pricing schedule)** attached hereto.

7.2 This bid will be evaluated in the following 2 (two) phases:

7.2.1 **Phase 1 – (a) Compliance to Compulsory Conditions of the bid and (b) Agreement to Conditions of Contract.**

(a) Strict compliance to all Compulsory Conditions of the bid will be checked as part of Phase 1 (a) and agreement to all Conditions of Contract will be checked as part of Phase 1 (b). Bidders who do not comply with all compulsory bid conditions and/or do not agree to all the Conditions of Contract will not proceed to Phase 2 of the evaluation phase of this bid.

(b) Compliance for the purposes of Phase 1 (a) and Phase 1 (b) will be checked using the **checklist** provided in **Annexure C** Table C1. DOTP prefers that bidders complete and submit this checklist as part of their bids to ensure that compliance with the requirements applicable to Phase 1 (a) and Phase 1 (b) can be checked easily.

7.2.2 **Phase 2 – Application of price and preference points**

(a) All acceptable bids will compete on price and B-BBEE compliance. Allocation of points for price and B-BBEE contribution level status shall be done in accordance with the applicable provisions of the Preferential Procurement Policy Framework Act, 2000 (Act 5 of 2000), read with the Preferential Procurement Regulations, 2022.

(b) Price on the required pricing schedule **WCBD 3.3 (Pricing Schedule)** will be evaluated and adjudicated on the **total cost for all service categories**. A bid not containing a completed pricing schedule that conforms in all material respects to the format set out in the WCBD 3.3 form attached hereto, read with paragraph 6 above, shall not be eligible for evaluation under Phase 2. A unit price must be provided for each line item, failing which it will be assumed that the bidder is unable to provide the services not priced for.

(c) This bid will be evaluated on the 80/20 principle as follows:

**Table 3: Breakdown and Weighting**

No	BREAKDOWN	Points
1.	PPPFA / B-BBEE scoring	20
2.	Price	80
	<b>Total</b>	<b>100</b>

(d) As indicated above, DOTP reserves the right not to award any contract contemplated herein.

## **8. IMPORTANT INFORMATION TO BIDDERS**

The DOTP reserves the right to negotiate with the preferred bidder prior to the award of the tender contemplated herein, but within the applicable Bid validity period.

## ANNEXURE C: SUMMARY OF DOCUMENTATION REQUIRED

Refer to section 5 for an explanation of the Bid Evaluation process.

This annexure contains submission instructions and a checklist of the required documents to be included in the submission.

### A.1 Submission Instructions

- (i) Please note that a two-envelope system will be utilised for this tender.
- (ii) **Envelope One** contains the **Bid Proposal** which must be sealed in an envelope marked with the name of the bidder and entitled: "Bid Proposal: Bid Number FMA 0006-2023/24".  
The Bid Proposal envelope should contain the documents mentioned in section A.2 below.
- (iii) Each bid must include a second envelope separate to the Bid Proposal. **Envelope Two** contains the **Financial Proposal** which must be sealed in an envelope marked with the name of the bidder and entitled: "Financial Proposal: Bid Number FMA 0006-2023/24".
  - The bidder's financial proposal will only be evaluated as part of Phase 2.
  - The Financial Proposal envelope (Envelope Two) must contain a duly completed and signed WCBD 3.3 form (pricing schedule) in the format attached hereto.

### A.2 Documents required with Bid Proposal in First Envelope

The First Envelope must contain the information in Table C1 following.

Please provide all the information as a single stack of pages numbered sequentially from 1.

Printout Table 1 and Table 2 and complete columns E and F (Submitted and Page No) and include as a cover to your submission.

Note that the Page No (F) refers to the page number in your Bid Proposal. The TOR Ref column (D) refers to the section within this Bid Specification document.

**TABLE C1: DOCUMENTS REQUIRED IN FIRST ENVELOPE: BID PROPOSAL**

(A)	(B)	(C)	(D)	(E)	(F)
#	TABLE C1:	Nature of evidence	TOR Ref	Submitted Y/N	Page No.
1	Copy of Table C1 Checklist	Copy of this <b>Table C1</b> with columns (E) and (F) completed – Submitted and Page No.	Annexure C		
2	Copy of Table 1	We prefer that you submit a copy of Table 1 indicating Compliance / Non-Compliance / Not Applicable.	4.2		
3	Proof of registration	CSD registration on Central Supplier Database	4.2.1		
4	WCBD 1	Duly completed and signed <b>WCBD 1</b> form	4.2.2		
5	WCBD 4 if applicable	Duly completed and signed <b>WCBD 4</b> form	4.2.3		
6	WCBD 6.1 if applicable	Where the bidder intends to claim preferential procurement points for B-BBEE, each bid must contain a duly completed and signed <b>WCBD 6.1</b> form	4.2.4		
7	Consortium if applicable	Where bidder is a consortium or joint venture of two or more firms, submission of a copy of the consortium formation document or joint venture agreement, as applicable, which sets forth the precise responsibilities of each of the parties thereto. The joint venture agreement or consortium formation document submitted as part of the bid must make it unambiguously clear that the arrangement between the member firms is either a joint venture or a consortium (as the case may be) and is not a sub-contracting arrangement. <b>All standard bidding forms (i.e., WCBD 1, WCBD 4 and WCBD 6.1) must be completed in respect of each member firm. A trust, consortium or joint venture (including unincorporated consortia and joint ventures) must submit a consolidated B-BBEE Status Level Verification Certificate for every separate tender.</b>	4.2.5		

<p>8</p> <p><b>Annexure D</b> Resource Matrix and CVs</p>	<p>To demonstrate the bidder's capability to start from day 1, please supply the following CVs per role. CVs should be no more than four pages long and clearly meet the relevant minimum criteria detailed in section 3.6.</p> <p>The resource requirements and quantities below are the minimum number of resources required per resource role for evaluation and adjudication purposes only and represent a typical mix of resources in a team. Actual resource quantities required are unknown and subject to actual DOP demand, and the bidder should not infer any minimum number of resources to be provided</p> <p><u>1 X Project Manager</u></p> <ul style="list-style-type: none"> <li>• A minimum of 5 years' Project Management experience, inclusive of experience in managing Leadership development or Culture Change projects.</li> </ul> <p><u>2 X Managing System Coaches</u></p> <ul style="list-style-type: none"> <li>- A minimum of 5 years combined executive management development or culture transformation experience in private (Blue chip Corporate at an Executive level) and public sector (Top management – Chief Director to Head of Departments, Head of Ministry, Members of Parliament), with a minimum of one project <b>completed in the public sector</b> and one project in the private sector;</li> <li>- 7 years' combined experience in executive coaching in private and public sector, with a minimum of one project completed in the public sector and at least one executive coaching project aimed at organisational culture change outcomes;</li> <li>- A post graduate coaching qualification (such as a Professional Certified Coach (PCC) or a Master Certified Coach (MCC)) or NQF level 9 master's degree required in one of the following fields: <ul style="list-style-type: none"> <li>• Culture Transformation;</li> <li>• Leadership Development;</li> <li>• Management Coaching;</li> <li>• (Business, Executive and / or Leadership) Coaching;</li> <li>• Emotional Intelligence; or</li> <li>• Neuro-Linguistic Programming;</li> </ul>           [Please note: Qualifications are required to ensure technical competence and level of technical engagement.] </li> <li>- A registration of membership with one or more of the following Professional Coaching Bodies: <ul style="list-style-type: none"> <li>• Coaches and Mentors of South Africa (COMENSA);</li> <li>• International Coaching Federation (ICF); or</li> <li>• European Mentoring and Coaching Council;</li> </ul> </li> </ul>	<p>3.6, 4.2.6 and Annexure D</p>
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			<p>[Please note: Managing System Coaches are required to have a qualification <b>and</b> registration of membership with a professional coaching body as described above. With regard to the registration of membership with a Professional Coaching Body, evidence will be accepted in the form of a certificate, registration card, official letter from the board, official board / association registry – if the information is on a website a print-out from the website is required and attached to the CV of the Managing System Coach.]</p> <ul style="list-style-type: none"> <li>- A minimum of 1 (one) year's training in or applied practice of: <ul style="list-style-type: none"> <li>• Emotional Intelligence</li> <li>• Neuro / Brain functioning theory; and</li> <li>• Systems thinking methodology; and</li> </ul> </li> </ul> <p>An Integrative Enneagram professional practitioner certificate from a trainer certified by Integrative Enneagram Solutions (current valid membership is required).</p> <p><u>10 x System Coaches</u></p> <ul style="list-style-type: none"> <li>- A minimum of 5 years combined executive management development and culture transformation experience in private (Blue chip Corporate at an Executive level) and public sector (Top management – Chief Director to Head of Departments, Head of ministry, Members of parliament), with a minimum of one project in public sector;</li> <li>- Minimum of 5 years' combined experience in executive coaching in private and public sector, with a minimum of one project completed in public sector;</li> <li>- A post graduate coaching qualification (such as a PCC or MCC) or NQF level 9 master's degree required in one of the following fields: <ul style="list-style-type: none"> <li>• Culture Transformation;</li> <li>• Leadership Development;</li> <li>• Management Coaching;</li> <li>• (Business, Executive and / or Leadership) Coaching;</li> <li>• Emotional Intelligence; or</li> <li>• Neuro-Linguistic Programming, to ensure technical competence and level of technical engagement;</li> </ul> </li> </ul> <p><b>alternatively</b></p> <ul style="list-style-type: none"> <li>- A registration of membership with one or more of the following Professional Coaching Bodies: <ul style="list-style-type: none"> <li>• Coaches and Mentors of South Africa (COMENSA);</li> <li>• International Coaching Federation (ICF); or</li> <li>• European Mentoring and Coaching Council;</li> </ul> </li> </ul> <p>[Please note: System Coaches are required to have <b>either</b> a qualification <b>or</b> registration of membership with a professional coaching body as described above.</p>		
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(A)	(B)	(C)	(D)	(E)	(F)
#	TABLE C1:	Nature of evidence	TOR Ref	Submitted Y/N	Page No
		<p>With regard to the registration of membership with a Professional Coaching Body, evidence will be accepted in the form of a certificate, registration card, official letter from the board, official board/ association registry – if the information is on a website a print-out from the website is required and attached to the CV of the System Coach.]</p> <ul style="list-style-type: none"> <li>- A minimum of 1 (one) year's training or applied practice of: <ul style="list-style-type: none"> <li>• Emotional Intelligence;</li> <li>• Neuro / Brain functioning theory; and</li> <li>• Systems thinking methodology; and</li> </ul> </li> </ul> <p>A minimum of 3 (three) System Coaches must be trained and have an Integrative Enneagram professional practitioner certificate from a trainer certified by Integrative Enneagram Solutions (current valid membership is required).</p> <p>Each bid must contain a comprehensive technical proposal that must include at least the following:</p> <ul style="list-style-type: none"> <li>• Company Overview;</li> <li>• A <b>Business Profile</b> must be provided that indicates the <b>nature and the scope of work performed by the bidder</b>, as well as industry experience in rendering service/s where interest was expressed.</li> <li>• A <b>portfolio of evidence containing examples</b> of previous work done (e.g., Executive development, culture transformation work, executive coaching programme executed); and the e-learning platform utilised.</li> </ul> <p>Evidence must include the following:</p> <ul style="list-style-type: none"> <li>- project plan examples;</li> <li>- coaching approach towards achieving change;</li> <li>- individual and group report examples;</li> <li>- project feedback and/or closing report including indication of level of impact achieved; and</li> <li>- in respect of the e-learning platform please include screen shots and descriptions of the e-learning platform functionality and benefits.</li> </ul> <ul style="list-style-type: none"> <li>• Understanding of DOTP Requirements as it relates to the required services described in paragraph 3 above also illustrating how the services are to be delivered;</li> <li>• Experience of the System Coaching Team;</li> <li>• Track record not older than 7 years and relevant experience in delivering the same services in the delivery of a System Coaching Programme contemplated herein; and</li> <li>• Any other items the bidder wishes to add.</li> </ul>			
9	Technical Proposal		4.2.8		



(A)	(B)	(C)	(D)	(E)	(F)
#	TABLE C1:	Nature of evidence	TOR Ref	Submitted Y/N	Page No
10	Contactable Reference List	The bidder must <b>provide a completed Contactable Reference List template</b> that will be utilise to verify previous work done on the relevant service/s.	4.2.7 and Annexure E		
11	Reference Letters and / sworn affidavits	The bidder must <b>provide a minimum of three (3) contactable reference letters or sworn affidavits</b> that the DOTP will utilise to verify previous work done on the relevant service/s.	4.2.7 and Annexure F (if applicable)		

TABLE C2: DOCUMENTS REQUIRED IN SECOND ENVELOPE: FINANCIAL PROPOSAL

(A)	(B)	(C)	(D)	(E)
#	TABLE C2:	Nature of evidence	TOR Ref	Submitted Y/N
1	Financial proposal: WCBD 3.3	Submission of the Financial Proposal ( <b>WCBD 3.3</b> ) must be sealed in an envelope	4.2.9 and Pricing schedule referred to in paragraph 6	

**Annexure D: Resource Matrix (note: more rows may be added if required)**

Role	Full Name Resource	Years of experience in executive management development and/or culture transformation in private and public sector	Years of experience in executive coaching in private and public sector	Confirm post graduate qualification in Coaching or relevant NQF level 9 master's degree	Years of training or experience in systems thinking methodology	Years of training or experience in Emotional Intelligence methodology	Years of training or experience in Neuro/ Brain functioning theory	Confirmation of registration with Professional Coaching body and name of such Professional Coaching body	Years of Project management experience	Confirm Practitioner Certification in Integrative Enneagram (Y / N)
Project Manger										
Managing System Coach									n/a	
Managing System Coach									n/a	
System Coach									n/a	
System Coach									n/a	
System Coach									n/a	
System Coach									n/a	
System Coach									n/a	
System Coach									n/a	
System Coach									n/a	
System Coach									n/a	
System Coach									n/a	
System Coach									n/a	
System Coach									n/a	
System Coach									n/a	

**Note:** Years of experience for the relevant role and specific requirements, must be clearly identifiable in the CV to confirm the summary of the information provided in Annexure D.

**ANNEXURE E: CONTACTABLE REFERENCES LIST (Note: More rows may be added if required)**

<b>No.</b>	<b>Registered Name of Enterprise / Organisation</b>	<b>Type of organisation (Private or Public)</b>	<b>Type of Service rendered</b>	<b>Full name of Contact Person</b>	<b>Contact Number (Please provide mobile and landline numbers)</b>	<b>Email Address</b>	<b>Reference Number of Reference letter or Sworn Affidavit</b>
1.							
2.							
3.							
4.							
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AFFIDAVIT

TO BE COMPLETED BY A DULY AUTHORISED REPRESENTATIVE OF THE BIDDER FOR EACH CONTACTABLE REFERENCE CITED IN ANNEXURE E THAT

CANNOT OR DOES NOT PROVIDE AN ORIGINAL REFERENCE LETTER

[Please ensure this affidavit is completed in full. Each page must be initialled or signed (where indicated) by the deponent and the Commissioner of Oaths.]

I, \_\_\_\_\_ (full name of an authorised representative of the bidder), with Identity / Passport Number \_\_\_\_\_, do hereby swear / solemnly and sincerely affirm and declare the following:

1. I am duly authorised to depose to this affidavit for and on behalf of \_\_\_\_\_ (registered name of the bidder) with registration number \_\_\_\_\_ (registration number) ("the Bidder");

2. The Bidder has undertaken the following design of System Coaching services for \_\_\_\_\_ (registered name of bidder's client) ("the Enterprise / Organisation");

No.	Scope of services / Deliverables	Contract Start Date and Duration	Resources used (i.e. quantity and resource description)	Contract Status (i.e. Indicate status using one of the following: Completed / In Progress / Incomplete)	Customer Satisfaction Level determined by the Enterprise / Organisation (Indicate level using one of the following: Unsatisfied / Somewhat satisfied / Fully satisfied / Exceeded expectations)
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					

No.	Scope of services / Deliverables	Contract Start Date and Duration	Resources used (i.e. quantity and resource description)	Contract Status (i.e. Indicate status using one of the following: Completed / In Progress / Incomplete)	Customer Satisfaction Level determined by the Enterprise / Organisation (Indicate level using one of the following: Unsatisfied / Somewhat satisfied / Fully satisfied / Exceeded expectations)
11.					
12.					
13.					
14.					
15.					
16.					
17.					
18.					
19.					
20.					

3. The Enterprise / Organisation has ..... (amount in words) or more employees [please complete with correct number of employees].
4. Further information regarding the projects listed above and the services provided by the Bidder to the Enterprise / Organisation in relation thereto may be obtained from the following contact person (who has been designated for such purpose by the Enterprise / Organisation):

Name: \_\_\_\_\_

Designation: \_\_\_\_\_

Telephone No.: \_\_\_\_\_

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

5. The information set out above is accurate, up-to-date and correct in all respects.

**Signature of the Bidder's representative**

Full name of the Bidder's representative: \_\_\_\_\_

Identity / Passport Number of the Bidder's representative: \_\_\_\_\_

Date: \_\_\_\_\_

I hereby certify that:

1. The deponent acknowledged to me that:
  - 1.1. He / she knows and understands the contents of this affidavit;
  - 1.2. He / she has no objection to taking the prescribed oath / making the prescribed affirmation (*please delete whichever is not applicable*);
  - 1.3. He / she considers the prescribed oath / affirmation (*please delete whichever is not applicable*) to be binding on his / her conscience;
2. The deponent thereafter uttered the words:
  - 2.1. "I swear that the contents of this affidavit are true, so help me God" (where he / she took the prescribed oath); or
  - 2.2. "I solemnly and sincerely affirm that the contents of this affidavit are true" (where he / she took the prescribed affirmation);(as the case may be); and
3. The deponent signed this affidavit in my presence at the address set out hereunder on the \_\_\_\_ day of \_\_\_\_ 20\_\_\_\_.

\_\_\_\_\_  
**Commissioner of Oaths**

Full names: \_\_\_\_\_

Designation: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Commissioner of Oaths stamp:



# **THE NATIONAL TREASURY**

**Republic of South Africa**



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## **GOVERNMENT PROCUREMENT: GENERAL CONDITIONS OF CONTRACT**

**July 2010**



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

**NOTES**

The purpose of this document is to:

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

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

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

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## **General Conditions of Contract**

### **1. Definitions**

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

RSA.

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

obligations of the supplier covered under the contract.

- 1.25 “Written” or “in writing” means handwritten in ink or any form of electronic or mechanical writing.

## **2. Application**

- 2.1 These general conditions are applicable to all bids, contracts and orders including bids for functional and professional services, sales, hiring, letting and the granting or acquiring of rights, but excluding immovable property, unless otherwise indicated in the bidding documents.
- 2.2 Where applicable, special conditions of contract are also laid down to cover specific supplies, services or works.
- 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, the purchaser shall not be liable for any expense incurred in the preparation and submission of a bid. Where applicable a non-refundable fee for documents may be charged.
- 3.2 With certain exceptions, invitations to bid are only published in the Government Tender Bulletin. The Government Tender Bulletin may be obtained directly from the Government Printer, Private Bag X85, Pretoria 0001, or accessed electronically from [www.treasury.gov.za](http://www.treasury.gov.za)

## **4. Standards**

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

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

- 5.1 The supplier shall not, without the purchaser’s prior written consent, disclose the contract, or any provision thereof, or any specification, plan, drawing, pattern, sample, or information furnished by or on behalf of the purchaser in connection therewith, to any person other than a person employed by the supplier in the performance of the contract. Disclosure to any such employed person shall be made in confidence and shall extend only so far as may be necessary for purposes of such performance.
- 5.2 The supplier shall not, without the purchaser’s prior written consent, make use of any document or information mentioned in GCC clause 5.1 except for purposes of performing the contract.
- 5.3 Any document, other than the contract itself mentioned in GCC clause 5.1 shall remain the property of the purchaser and shall be returned (all copies) to the purchaser on completion of the supplier’s performance under the contract if so required by the purchaser.
- 5.4 The supplier shall permit the purchaser to inspect the supplier’s records relating to the performance of the supplier and to have them audited by auditors appointed by the purchaser, if so required by the purchaser.

## **6. Patent rights**

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

**7. Performance security**

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

**8. Inspections, tests and analyses**

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

analyzed and may be rejected if found not to comply with the requirements of the contract. Such rejected supplies shall be held at the cost and risk of the supplier who shall, when called upon, remove them immediately at his own cost and forthwith substitute them with supplies which do comply with the requirements of the contract. Failing such removal the rejected supplies shall be returned at the suppliers cost and risk. Should the supplier fail to provide the substitute supplies forthwith, the purchaser may, without giving the supplier further opportunity to substitute the rejected supplies, purchase such supplies as may be necessary at the expense of the supplier.

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

## **9. Packing**

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

## **10. Delivery and documents**

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

## **11. Insurance**

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

## **12. Transportation**

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

## **13. Incidental services**

- 13.1 The supplier may be required to provide any or all of the following services, including additional services, if any, specified in SCC:
- (a) performance or supervision of on-site assembly and/or commissioning of the supplied goods;
  - (b) furnishing of tools required for assembly and/or maintenance of the supplied goods;
  - (c) furnishing of a detailed operations and maintenance manual for each appropriate unit of the supplied goods;



- (d) performance or supervision or maintenance and/or repair of the supplied goods, for a period of time agreed by the parties, provided that this service shall not relieve the supplier of any warranty obligations under this contract; and
- (e) training of the purchaser's personnel, at the supplier's plant and/or on-site, in assembly, start-up, operation, maintenance, and/or repair of the supplied goods.

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

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

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

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

#### **15. Warranty**

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

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

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

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

15.5 If the supplier, having been notified, fails to remedy the defect(s) within the period specified in SCC, the purchaser may proceed to take

such remedial action as may be necessary, at the supplier's risk and expense and without prejudice to any other rights which the purchaser may have against the supplier under the contract.

**16. Payment**

- 16.1 The method and conditions of payment to be made to the supplier under this contract shall be specified in SCC.
- 16.2 The supplier shall furnish the purchaser with an invoice accompanied by a copy of the delivery note and upon fulfillment 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 supplier.
- 16.4 Payment will be made in Rand unless otherwise stipulated in SCC.

**17. Prices**

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

**18. Contract amendments**

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

**19. Assignment**

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

**20. Subcontracts**

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

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

- 21.1 Delivery of the goods and performance of services shall be made by the supplier in accordance with the time schedule prescribed by the purchaser in the contract.
- 21.2 If at any time during performance of the contract, the supplier or its subcontractor(s) should encounter conditions impeding timely delivery of the goods and performance of services, the supplier shall promptly notify the purchaser in writing of the fact of the delay, its likely duration and its cause(s). As soon as practicable after receipt of the supplier's notice, the purchaser shall evaluate the situation and may at his discretion extend the supplier's time for performance, with or without the imposition of penalties, in which case the extension shall be ratified by the parties by amendment of contract.
- 21.3 No provision in a contract shall be deemed to prohibit the obtaining of supplies or services from a national department, provincial department, or a local authority.
- 21.4 The right is reserved to procure outside of the contract small quantities or to have minor essential services executed if an emergency arises, the

supplier's point of supply is not situated at or near the place where the supplies are required, or the supplier's services are not readily available.

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

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

## **22. Penalties**

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

## **23. Termination for default**

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

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

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

23.3 Where the purchaser terminates the contract in whole or in part, the purchaser may decide to impose a restriction penalty on the supplier by prohibiting such supplier from doing business with the public sector for a period not exceeding 10 years.

23.4 If a purchaser intends imposing a restriction on a supplier or any

person associated with the supplier, the supplier will be allowed a time period of not more than fourteen (14) days to provide reasons why the envisaged restriction should not be imposed. Should the supplier fail to respond within the stipulated fourteen (14) days the purchaser may regard the intended penalty as not objected against and may impose it on the supplier.

23.5 Any restriction imposed on any person by the Accounting Officer / Authority will, at the discretion of the Accounting Officer / Authority, also be applicable to any other enterprise or any partner, manager, director or other person who wholly or partly exercises or exercised or may exercise control over the enterprise of the first-mentioned person, and with which enterprise or person the first-mentioned person, is or was in the opinion of the Accounting Officer / Authority actively associated.

23.6 If a restriction is imposed, the purchaser must, within five (5) working days of such imposition, furnish the National Treasury, with the following information:

- (i) the name and address of the supplier and / or person restricted by the purchaser;
- (ii) the date of commencement of the restriction
- (iii) the period of restriction; and
- (iv) the reasons for the restriction.

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

23.7 If a court of law convicts a person of an offence as contemplated in sections 12 or 13 of the Prevention and Combating of Corrupt Activities Act, No. 12 of 2004, the court may also rule that such person's name be endorsed on the Register for Tender Defaulters. When a person's name has been endorsed on the Register, the person will be prohibited from doing business with the public sector for a period not less than five years and not more than 10 years. The National Treasury is empowered to determine the period of restriction and each case will be dealt with on its own merits. According to section 32 of the Act the Register must be open to the public. The Register can be perused on the National Treasury website.

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

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

may be due to him

**25. Force Majeure**

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

**26. Termination for insolvency**

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

**27. Settlement of Disputes**

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

**28. Limitation of liability**

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

	(b) the aggregate liability of the supplier to the purchaser, whether under the contract, in tort or otherwise, shall not exceed the total contract price, provided that this limitation shall not apply to the cost of repairing or replacing defective equipment.
<b>29. Governing language</b>	29.1 The contract shall be written in English. All correspondence and other documents pertaining to the contract that is exchanged by the parties shall also be written in English.
<b>30. Applicable law</b>	30.1 The contract shall be interpreted in accordance with South African laws, unless otherwise specified in SCC.
<b>31. Notices</b>	<p>31.1 Every written acceptance of a bid shall be posted to the supplier concerned by registered or certified mail and any other notice to him shall be posted by ordinary mail to the address furnished in his bid or to the address notified later by him in writing and such posting shall be deemed to be proper service of such notice</p> <p>31.2 The time mentioned in the contract documents for performing any act after such aforesaid notice has been given, shall be reckoned from the date of posting of such notice.</p>
<b>32. Taxes and duties</b>	<p>32.1 A foreign supplier shall be entirely responsible for all taxes, stamp duties, license fees, and other such levies imposed outside the purchaser's country.</p> <p>32.2 A local supplier shall be entirely responsible for all taxes, duties, license fees, etc., incurred until delivery of the contracted goods to the purchaser.</p> <p>32.3 No contract shall be concluded with any bidder whose tax matters are not in order. Prior to the award of a bid the Department must be in possession of a tax clearance certificate, submitted by the bidder. This certificate must be an original issued by the South African Revenue Services.</p>
<b>33. National Industrial Participation Programme (NIP)</b>	33.1 The NIP Programme administered by the Department of Trade and Industry shall be applicable to all contracts that are subject to the NIP obligation.
<b>34 Prohibition of Restrictive practices</b>	<p>34.1 In terms of section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, an agreement between, or concerted practice by, firms, or a decision by an association of firms, is prohibited if it is between parties in a horizontal relationship and if a bidder (s) is / are or a contractor(s) was / were involved in collusive bidding (or bid rigging).</p> <p>34.2 If a bidder(s) or contractor(s), based on reasonable grounds or evidence obtained by the purchaser, has / have engaged in the restrictive practice referred to above, the purchaser may refer the matter to the Competition Commission for investigation and possible imposition of administrative penalties as contemplated in the Competition Act No. 89 of 1998.</p>

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

Js General Conditions of Contract (revised July 2010)