



**FILE NUMBER: 5/1/3/B/WCED 3145/24**  
**ENQUIRIES: L DIAMOND**

Dear prospective bidder,

1. You are hereby invited to bid for requirements of the Western Cape Education Department (WCED) in respect of the service indicated below and you are encouraged to carefully read ALL information contained within this invitation.

BID NUMBER : B/WCED 3145/24

BID DESCRIPTION : **APPOINTMENT OF A SERVICE PROVIDER TO DEVELOP MATHEMATICS AND LANGUAGE TESTING INSTRUMENTS TO TEST GRADE 3, 6 AND 9 LEARNERS AS PART OF THE WCED DIAGNOSTIC TESTING PROGRAMME. THIS WILL BE A THREE-YEAR CONTRACT FROM 1 APRIL 2025 TO 31 MARCH 2028**

CLOSING DATE AND TIME : **31 JANUARY 2025 AT 11:00am**

VALIDITY PERIOD : 120 DAYS

2. To be eligible to conduct business with the Western Cape Government (WCG), you must be registered on the Central Supplier Database (CSD). If you are not registered on the CSD you are required to self-register on [www.csd.gov.za](http://www.csd.gov.za). Assistance in this regard may be requested from the National Treasury on (012) 315 5509 or [csd@treasury.gov.za](mailto:csd@treasury.gov.za).
3. The Western Cape Supplier Evidence bank (WCSEB) has replaced the Western Cape Supplier Database (WCSD) with effect from 1 October 2019. Suppliers must ensure that their profile on the WCSEB is up to date at all times. Should your profile information have changed after your last bid submission, please update this information with the Western Cape Provincial Treasury situated at:

SAP Ariba  
2<sup>nd</sup> Floor  
Waterford Place  
Century City

4. To be able to submit a responsive bid, you are required to:
  - a) furnish all required information as documented in the WCBD 3.4 Specifications Compliance Schedule;
  - b) tailor your bid offer to conform to the advertised evaluation criteria;
  - c) submit ALL required supporting documents (e.g. Memorandum of Understanding (Should the bid be submitted as a Consortium/Joint Venture, each party must be actively registered on the WCSEB and the CSD), lease agreements, company profiles, Gantt Charts, etc.);

- d) Should the bid be submitted as a Consortium/Joint Venture, submit a Memorandum of Understanding outlining the roles and responsibilities of each party and each party must be actively registered on the CSD.
- e) submit your Master Registration Number (Supplier number) as registered on the CSD to enable the WCED to verify your tax compliance status.
- f) ensure all signatures on bid documentation are completed where required, i.e. bidder and witnesses, failing which the bid will be invalid.

This bid contains a checklist to enable you to submit a responsive bid. It is incumbent on you to ensure that you have completed all the required documents in its entirety.

5. The bid documents include a WCBD 4 Declaration of Interest Form which you have to complete. We stress that these documents must be completed in full and returned with the bid. Be reminded of the fact that the WCED will verify the information divulged within this declaration and should it transpire that a bidder has submitted a false declaration, the remedies at the Department's disposal will be considered (a bid may be disqualified if a bidder has attempted to breach or have abused the SCM system).
6. The Preferential Procurement Regulations, 2022 effective from 16 January 2023 will apply in this bid. Please acquaint yourself with such Regulations. Please note that points for B-BBEE status level of contribution will only be awarded to bidders who claim such points through the completion of the WCD 6.1 Preference Points Claim Form, in full (and which you are required to read in its entirety) and who submit proof of such B-BBEE status level of contribution, which can be in the form of the following:
  - a) a B-BBEE Verification Certificate issued by a Verification Agency accredited by the South African Accreditation System (SANAS) and which is applicable for the sector within which the bid is submitted (for example, a B-BBEE certificate for the catering and Hospitality sector is not applicable for Transport and Storage bids); or
  - b) an affidavit, in the form prescribed by the Department of Trade and Industry (dti) which confirms the annual total revenue and level of black ownership together with the sector in respect of which it is issued. This form is obtainable on the dti website; or
  - c) an affidavit issued by Companies Intellectual Property Commission (CIPC).
7. The General Conditions of Contract (GCC) and if applicable, any other special conditions of contract, which are reflected in the WCBD 3.4 Specifications Compliance Schedule will prevail in this bid. Bidders are requested to refrain from setting own conditions of contract. Invariably, such bids will be regarded as non-responsive to the bid invitation.
8. Bid documents must be deposited in the bid box situated at:

1 North Wharf Square Building,  
2 Lower Loop Street,  
Foreshore,  
Cape Town  
8001

This bid box is accessible 24 hours a day, 7 days a week and is located as indicated above. The slot opening can be accessed from the street level and there is no need to enter the building to deposit the bid into the box. **If the bid is late, it will not be accepted for consideration.**

**Only if the bid documents are too bulky to be deposited through the slot opening of the bid box, bid documents may be hand delivered to:**

The Deputy Director: SCM Operations (Mr. E Philander)

1 North Wharf Square Building,  
2 Lower Loop Street,  
Foreshore,  
Cape Town  
8001

Should you opt to deliver such bid via a courier, the onus remains with the bidder to ensure that the bid is submitted timeously and to the correct address. Please refer to the directions regarding the lodging of bids.

9. Should you have difficulties with the interpretation of certain clauses or requirements of the bid documents or the completion of forms, you may direct your enquiries during office hours (09h00 – 15h00) to:

**Name:** L Diamond

**Telephone no:** (021) 467 2358

**Email address:** Lesley-Ann.Diamond@westerncape.gov.za

Yours faithfully



**K MABUTO**

**ACTING ASSISTANT DIRECTOR: SPECIFICATIONS & QUOTATIONS**

**DATE:** 03.12.2024

# WESTERN CAPE EDUCATION DEPARTMENT

## CHECKLIST

| BID REQUIREMENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | REFERENCE  |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| <b>BID OFFERS WITHOUT THE FOLLOWING DOCUMENTS WILL NOT BE CONSIDERED:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |            |
| Completed in full and signed WCBD 1 The Bid                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | WCBD 1     |
| In the case of Consortia or Joint Ventures a Memorandum of Understanding, outlining the roles and responsibilities of all parties to the Joint Ventures or Consortia, must be <u>signed</u> by all parties.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |            |
| General Conditions of Contract                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Annexure A |
| Completed in full WCBD 3.1 Pricing Schedule                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | WCBD 3.1   |
| Completed in full WCBD 3.4 Specification Compliance Schedule                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | WCBD 3.4   |
| All signatures on bid documentation are completed where required, i.e. bidder and witnesses, failing which the bid will be invalid                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |            |
| <b>NON-ADHERENCE TO THE FOLLOWING WILL NOT INVALIDATE A BID:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |            |
| A fully completed Consolidated Declaration of Interest (WCBD 4). In the case of a Consortium or Joint Venture <u>both parties</u> must <u>complete and sign</u> the Declaration of Interest form.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | WCBD 4     |
| Addendum to the WCBD 4                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |            |
| a) a B-BBEE Verification Certificate issued by a Verification Agency accredited by the South African Accreditation System (SANAS) and which is applicable for the sector within which the bid is submitted (for example, a B-BBEE certificate for the catering and Hospitality sector is not applicable for Transport and Storage bids); or<br>b) an affidavit, in the form prescribed by the Department of Trade and Industry (dti) which confirms the annual total revenue and level of black ownership together with the sector in respect of which it is issued. This form is obtainable on the dti website;<br>or<br>c) an affidavit issued by Companies Intellectual Property Commission (CIPC) | WCBD 6.1   |
| An original or certified copy of a B-BBEE Status level of Contribution Certificate. In the case of a Consortium or Joint Venture a <u>consolidated</u> B-BBEE Status Level of Contribution Certificate, <u>in the name</u> of the Joint Venture or Consortium must be submitted.                                                                                                                                                                                                                                                                                                                                                                                                                      |            |
| An original or certified <b>black &amp; white</b> copy of the company registration documents, i.e CK 1, CK 2, etc.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |            |
| I confirm that all documents requested are attached / not attached<br>Comments:<br>.....<br>Signature.....Print.....Date.....                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |            |
| <b>Each bid must be addressed in accordance with the directives in the bid documents and must be lodged in a separate sealed envelope with the name and address of the bidder, the bid number and the closing date indicated on the reverse side of the envelope.</b>                                                                                                                                                                                                                                                                                                                                                                                                                                 |            |

**WESTERN CAPE EDUCATION DEPARTMENT**

**CHECKLIST**

| <b>BID REQUIREMENT</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | <b>REFERENCE</b>   | <b>COMPLETED / ATTACHED</b> |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------|-----------------------------|
| Completed and signed WCBD 1 The Bid                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | WCBD 1             |                             |
| General Conditions of Contract                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Annexure A         |                             |
| Completed WCBD 3.1 Pricing Schedule                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | WCBD 3.1           |                             |
| Completed in full WCBD 3.4 Specification Compliance Schedule                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | WCBD 3.4           |                             |
| All signatures on bid documentation are completed where required, i.e. bidder and witnesses, failing which the bid will be invalid                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                    |                             |
| A fully completed Consolidated Declaration of Interest (WCBD 4). In the case of a Consortium or Joint Venture both parties must complete and sign the Declaration of Interest form.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | WCBD 4             |                             |
| Addendum to the WCBD 4                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                    |                             |
| Preference points claim form in terms of the Preferential Procurement Regulations 2022                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | WCBD 6.1           |                             |
| a) a B-BBEE Verification Certificate issued by a Verification Agency accredited by the South African Accreditation System (SANAS) and which is applicable for the sector within which the bid is submitted (for example, a B-BBEE certificate for the catering and Hospitality sector is not applicable for Transport and Storage bids); or<br>b) an affidavit, in the form prescribed by the Department of Trade and Industry (dti) which confirms the annual total revenue and level of black ownership together with the sector in respect of which it is issued. This form is obtainable on the dti website; or<br>c) an affidavit issued by Companies Intellectual Property Commission (CIPC) |                    |                             |
| An original or certified <b>black &amp; white</b> copy of the company registration documents, i.e CK 1, CK 2, etc.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                    |                             |
| <b>BIDDERS MUST SUBMIT A B-BBEE CERTIFICATE, TO QUALIFY FOR PREFERENCE POINTS</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                    |                             |
| I confirm that all documents requested are attached / not attached<br>Comments:<br>.....<br>Signature.....Print.....Date.....                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                    |                             |
| <b>Each bid must be addressed in accordance with the directives in the bid documents and must be lodged in a separate sealed envelope with the name and address of the bidder, the bid number and the closing date indicated on the reverse side of the envelope.</b>                                                                                                                                                                                                                                                                                                                                                                                                                              |                    |                             |
| <b>FOR DEPARTMENTAL USE:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                    |                             |
| Checked by .....                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Verified by: ..... |                             |
| Date: .....                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Date: .....        |                             |

# LESS RED-TAPE

Making it easier to do business in the Western Cape

Governance documents submitted only ONCE to the WCSEB instead of each tender (tenders <R500 000)

SBD 4, 8 and 9 consolidated into ONE document: WCBD4

Documents are vetted CENTRALLY and housed in a central repository for Provincial utilisation

RFI process REMOVED. Request for Quote (RFQ) is linked to suppliers' commodity list, request issued only to suppliers with matching lists

Tax compliance is VERIFIED VIA CSD - no need to submit tax clearance certificate to WCSEB

Suppliers will NOT be SUSPENDED for a non-compliant tax status. Procuring institution will verify compliance of recommended supplier

CSD and WCSEB registration process has been CONSOLIDATED AND STREAMLINED



## CONTACT



021 833 5361



Provincial Treasury  
4 Waterford Place, 2nd floor  
Century City, Cape Town  
8000



[wcseb@westerncape.gov.za](mailto:wcseb@westerncape.gov.za)



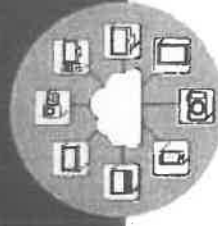
CSD Self registration  
<https://secure.csd.gov.za/>

Western Cape  
Supplier Helpdesk  
[www.westerncape.gov.za/provinci](http://www.westerncape.gov.za/provinci)  
[lat-treasury/services/supplier-helpdesk](http://lat-treasury/services/supplier-helpdesk)



Operating hours:  
Monday - Friday 8:00 - 15:30

# SUPPLIER



## TRANSITION

Western Cape Supplier  
Evidence Bank (WCSEB)

replaced  
Western Cape Supplier Database (WCSD)



**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: | <b>B/WCED 3145/24</b> | CLOSING DATE: | <b>31 JANUARY 2025</b> | CLOSING TIME: | <b>11H00</b> |
|-------------|-----------------------|---------------|------------------------|---------------|--------------|

|             |                                                                                                                                                                                                                                                            |
|-------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| DESCRIPTION | <b>APPOINTMENT OF A SERVICE PROVIDER TO DEVELOP MATHEMATICS AND LANGUAGE TESTING INSTRUMENTS TO TEST GRADE 3, 6 AND 9 LEARNERS AS PART OF THE WCED DIAGNOSTIC TESTING PROGRAMME. THIS WILL BE A THREE-YEAR CONTRACT FROM 1 APRIL 2025 TO 31 MARCH 2028</b> |
|-------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

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

**1 NORTH WHARF SQUARE BUILDING, 2 LOWER LOOP STREET, FORESHORE, CAPE TOWN, 8001 (PHOTO OF BID/TENDER BOX ENCLOSED)**

| <b>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO</b> | <b>TECHNICAL ENQUIRIES MAY BE DIRECTED TO:</b> |
|-------------------------------------------------------|------------------------------------------------|
|-------------------------------------------------------|------------------------------------------------|

|                |                |                |                |
|----------------|----------------|----------------|----------------|
| CONTACT PERSON | Ms. L. Diamond | CONTACT PERSON | Mr. K Govinden |
|----------------|----------------|----------------|----------------|

|                  |              |                  |              |
|------------------|--------------|------------------|--------------|
| TELEPHONE NUMBER | 021 467 2358 | TELEPHONE NUMBER | 021 467 2023 |
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| FACSIMILE NUMBER |  | FACSIMILE NUMBER |  |
|------------------|--|------------------|--|

|                |                                       |                |                                        |
|----------------|---------------------------------------|----------------|----------------------------------------|
| E-MAIL ADDRESS | Lesley-Ann.Diamond@westerncape.gov.za | E-MAIL ADDRESS | Krisseelan.Govinden@westerncape.gov.za |
|----------------|---------------------------------------|----------------|----------------------------------------|

**SUPPLIER INFORMATION**

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| NAME OF BIDDER |  |  |  |
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| POSTAL ADDRESS |  |  |  |
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| FACSIMILE NUMBER | CODE |  | NUMBER |  |
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| E-MAIL ADDRESS |  |  |  |  |
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| VAT REGISTRATION NUMBER |  |  |  |  |
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| SUPPLIER COMPLIANCE STATUS | WCSEB No. |  | TCS PIN: |  | <b>AND</b> | CSD No: | MAAA |
|----------------------------|-----------|--|----------|--|------------|---------|------|

|                                              |                                                                                   |  |                                     |                                                                                   |  |
|----------------------------------------------|-----------------------------------------------------------------------------------|--|-------------------------------------|-----------------------------------------------------------------------------------|--|
| B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE | [TICK APPLICABLE BOX]<br><input type="checkbox"/> Yes <input type="checkbox"/> No |  | B-BBEE STATUS LEVEL SWORN AFFIDAVIT | [TICK APPLICABLE BOX]<br><input type="checkbox"/> Yes <input type="checkbox"/> No |  |
|----------------------------------------------|-----------------------------------------------------------------------------------|--|-------------------------------------|-----------------------------------------------------------------------------------|--|

|                                                                                                                                  |                                                                                   |  |  |  |  |
|----------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|--|--|--|--|
| IF YES, WAS THE CERTIFICATE ISSUED BY A VERIFICATION AGENCY ACCREDITED BY THE SOUTH AFRICAN NATIONAL ACREDITATION SYSTEM (SANAS) | [TICK APPLICABLE BOX]<br><input type="checkbox"/> Yes <input type="checkbox"/> No |  |  |  |  |
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**[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<br>[IF YES ENCLOSE PROOF] | ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED? | <input type="checkbox"/> Yes <input type="checkbox"/> No<br>[IF YES, ANSWER THE QUESTIONNAIRE BELOW] |
| <b>QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS</b>                                                                                                                                                                          |                                                                                    |                                                                          |                                                                                                      |
| IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?                                                                                                                                                            |                                                                                    | <input type="checkbox"/> YES <input type="checkbox"/> NO                 |                                                                                                      |
| DOES THE ENTITY HAVE A BRANCH IN THE RSA?                                                                                                                                                                                  |                                                                                    | <input type="checkbox"/> YES <input type="checkbox"/> NO                 |                                                                                                      |
| DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?                                                                                                                                                                 |                                                                                    | <input type="checkbox"/> YES <input type="checkbox"/> NO                 |                                                                                                      |
| DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?                                                                                                                                                                      |                                                                                    | <input type="checkbox"/> YES <input type="checkbox"/> NO                 |                                                                                                      |
| IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?                                                                                                                                                                  |                                                                                    | <input type="checkbox"/> YES <input type="checkbox"/> NO                 |                                                                                                      |
| <b>IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.</b> |                                                                                    |                                                                          |                                                                                                      |

**PART B  
TERMS AND CONDITIONS FOR BIDDING**

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
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| <b>1. BID SUBMISSION:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <p>1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.</p> <p>1.2. <b>ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED – (NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.</b></p> <p>1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.</p> <p>1.4. <b>THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (WCBD7).</b></p>                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>2. TAX COMPLIANCE REQUIREMENTS</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <p>2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.</p> <p>2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.</p> <p>2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) OR PIN MAY ALSO BE MADE VIA E-FILING THROUGH THE WEBSITE WWW.SARS.GOV.ZA.</p> <p>2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE WITH TOGETHER WITH THE BID.</p> <p>2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE AND CSD NUMBER AS MENTIONED IN 2.3 ABOVE.</p> <p>2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.</p> <p>2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."</p> |
| <b>NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |

SIGNATURE OF BIDDER: .....

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

DATE: .....



**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.

|                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                    | <p>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.</p> <p>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.</p> <p>27.4 Mediation proceedings shall be conducted in accordance with the rules of procedure specified in the SCC.</p> <p>27.5 Notwithstanding any reference to mediation and/or court proceedings herein,</p> <ul style="list-style-type: none"> <li>(a) the parties shall continue to perform their respective obligations under the contract unless they otherwise agree; and</li> <li>(b) the purchaser shall pay the supplier any monies due the supplier.</li> </ul> |
| <b>28. Limitation of liability</b> | <p>28.1 Except in cases of criminal negligence or willful misconduct, and in the case of infringement pursuant to Clause 6;</p> <ul style="list-style-type: none"> <li>(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</li> <li>(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.</li> </ul>                                                                                                                                                       |
| <b>29. Governing language</b>      | <p>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.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>30. Applicable law</b>          | <p>30.1 The contract shall be interpreted in accordance with South African laws, unless otherwise specified in SCC.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <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</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |

purchaser's country.

- 32.2 A local supplier shall be entirely responsible for all taxes, duties, license fees, etc., incurred until delivery of the contracted goods to the purchaser.
- 32.3 No contract shall be concluded with any bidder whose tax matters are not in order. Prior to the award of a bid the Department must be in possession of a tax clearance certificate, submitted by the bidder. This certificate must be an original issued by the South African Revenue Services.

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

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

**34 Prohibition of Restrictive practices**

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

**PRICING SCHEDULE – FIRM PRICES**THIS DOCUMENT **MUST** BE COMPLETED IN CONJUNCTION WITH WCBD 3.4THIS DOCUMENT **MUST** BE COMPLETED IN BLACK OR BLUE **INDELIBLE** INK (NOT IN PENCIL)  
(FAILURE TO DO SO WILL RESULT IN YOUR BID BEING DISQUALIFIED)Name of bidder or Joint Venture..... Bid number: **B/WCED 3145/24**Closing date: **31 January 2025**Closing time: **11:00**

OFFER TO BE VALID FOR 120 DAYS FROM THE CLOSING DATE OF BID.

| ITEM NO. | QUANTITY | DESCRIPTION                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | BID PRICE IN RSA CURRENCY (INCLUDING VAT)                                                                                      |
|----------|----------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------|
| 1        | SERVICE  | <p>APPOINTMENT OF A SERVICE PROVIDER TO DEVELOP MATHEMATICS AND LANGUAGE TESTING INSTRUMENTS TO TEST GRADE 3, 6 AND 9 LEARNERS AS PART OF THE WCED DIAGNOSTIC TESTING PROGRAMME. THIS WILL BE A THREE-YEAR CONTRACT FROM 1 APRIL 2025 TO 31 MARCH 2028</p> <p>YEAR 1 -TOTAL COST FOR ABOVE SERVICE</p> <p>YEAR 2 -TOTAL COST FOR ABOVE SERVICE</p> <p>YEAR 3 -TOTAL COST FOR ABOVE SERVICE</p> <p>NOTE THAT THIS TOTAL BID PRICE MUST BE THE SAME AS THAT REFLECTED ON THE WCBD 3.4 (SPECIFICATION COMPLIANCE SCHEDULE)</p> | <p>R _____<br/>(incl. vat)</p> <p>R _____<br/>(incl. vat)</p> <p>R _____<br/>(Incl. vat)</p> <p>R.....<br/>TOTAL BID PRICE</p> |

## SPECIFICATION COMPLIANCE SCHEDULE (SERVICES)

THIS DOCUMENT MUST BE COMPLETED IN CONJUNCTION WITH WCBD 3.1 IN BLACK OR BLUE INDELIBLE INK (NOT IN PENCIL)

(FAILURE TO DO SO WILL RESULT IN YOUR BID BEING DISQUALIFIED)

|                                      |                                   |
|--------------------------------------|-----------------------------------|
| Name of Bidder or Joint Venture..... | Bid number: <b>B/WCED 3145/24</b> |
| Closing date: 31 January 2025        | Closing time: <b>11:00</b>        |

OFFER TO BE VALID FOR 120 DAYS FROM THE CLOSING DATE OF BID.

The **Bidder is required to indicate, adjacent to each paragraph** in the column provided for this purpose, whether the bidder is in **compliance with the bid specifications** and to what extent by writing **"Yes", "No", or "Noted"**. If any comments must be made with regard to the latter, this must be provided on an **addendum in which case the bidder must make reference to the relevant specification and attach any documentation, where required**.

In the event where a **written proposal for the service** is included in the bid, an **electronic version of such proposal** on disc must also be submitted with the bid.

**THE WESTERN CAPE EDUCATION DEPARTMENT (WCED) RETAINS THE RIGHT NOT TO ACCEPT THE LOWEST, HIGHEST OR ANY BID, OR TO ACCEPT PART OR WHOLE OF ANY BID.**

TOTAL BID PRICE (in RSA Currency including VAT)  
(Must be in line with amount indicated in WCBD 3.1)

R.....

**SERVICE**

| Item No | Quantity | Description                                                                                                                                                                                                                                                                                                                                                | Total bid price                                                                           |
|---------|----------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------|
| 1       | SERVICE  | <p>APPOINTMENT OF A SERVICE PROVIDER TO DEVELOP MATHEMATICS AND LANGUAGE TESTING INSTRUMENTS TO TEST GRADE 3, 6 AND 9 LEARNERS AS PART OF THE WCED DIAGNOSTIC TESTING PROGRAMME. THIS WILL BE A THREE-YEAR CONTRACT FROM 1 APRIL 2025 TO 31 MARCH 2028</p> <p>TOTAL BID PRICE - YEAR 1</p> <p>TOTAL BID PRICE - YEAR 2</p> <p>TOTAL BID PRICE - YEAR 3</p> | <p>R.....<br/>(Incl. VAT)</p> <p>R.....<br/>(Incl. VAT)</p> <p>R.....<br/>(Incl. VAT)</p> |

| Item No | Quantity | Description                                                                                                               | Total bid price             |
|---------|----------|---------------------------------------------------------------------------------------------------------------------------|-----------------------------|
|         |          | <b>Note:***The prices offered herein must be commensurate with the prices offered in the Pricing Schedule (WCBD 3.1).</b> | R.....<br>(Total Bid Price) |

| Paragraph                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | SPECIFICATION           | INDICATION OF COMPLIANCE                                                                                     |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------|--------------------------------------------------------------------------------------------------------------|
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                         | By indicating <b>Yes</b> within this column, the bidder confirms that it will meet the specified deliverable |
| <b>DESCRIPTION</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                         |                                                                                                              |
| Appointment of a service provider to develop mathematics and language testing instruments to test Grade 3, 6 and 9 learners as part of the WCED diagnostic testing programme. This will be a three-year contract from 1 April 2025 to 31 March 2028.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                         |                                                                                                              |
| <b><u>BACKGROUND</u></b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                         |                                                                                                              |
| <ul style="list-style-type: none"><li>• The Western Cape Education Department (WCED) in line with the policy of the Provincial Government of the Western Cape, has been conducting annual systemic testing of Grade 3, 6 and 9 learners to test the performance of the education system in the province.</li><li>• By policy, the tests must be independently administered so that the educators and other WCED curriculum specialists bias is removed in the assessment of learners.</li><li>• The tests, administrated through an instrument, are diagnostic in nature and allow for the identification of areas that are problematic for learners.</li><li>• This contract will cover Language and Mathematics in the three grades.</li></ul> |                         |                                                                                                              |
| <b>The Bidder must confirm that the following is complied with by indicating “YES” in the indicated column and by attaching the necessary documentation where required. By indicating “NO” the bidder confirms that it does not comply with the specifications and requirements.</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                         |                                                                                                              |
| <b><u>PLEASE NOTE:</u> DO NOT WRITE IN THE SHADED AREAS</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                         |                                                                                                              |
| <b>MAKE ADDITIONAL COMMENTS, TO RELEVANT SPECIFICATIONS ON AN ADDENDUM</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                         |                                                                                                              |
| 1.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | <b>DELIVERABLES</b>     | By indicating <b>Yes</b> within this column, the bidder confirms that it will meet the specified deliverable |
| 1.1                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <b>The Bidder must:</b> |                                                                                                              |

| Paragraph | SPECIFICATION                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | INDICATION OF COMPLIANCE                                                                                     |           |
|-----------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|-----------|
|           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | By indicating <b>Yes</b> within this column, the bidder confirms that it will meet the specified deliverable |           |
| 1.1.1     | Develop Mathematics and Language Testing Instruments for Grades 3, 6 and 9 that are internationally benchmarked and based on the Curriculum and Assessment Policy Statement (CAPS) adjusted according to the Annual Teaching Plans (ATP) or any other changes in the curriculum where necessary.                                                                                                                                                                                                                                                                                                                           | <b>YES</b>                                                                                                   | <b>NO</b> |
| 1.1.2     | <p>For each grade, the testing instruments referred to in 1.1.1 must be developed using a TWO books model according to Language of Learning and Teaching (LOLT) specifications (using a new testing framework). The model will focus on the use of a home language and additional languages. Specified as follows:</p> <p><b>Grade 3:</b><br/>2 x booklets for Mathematics and Language (Afrikaans, English and IsiXhosa).</p> <p><b>Grade 6:</b><br/>2 x booklets for Mathematics and Language (Afrikaans and English).</p> <p><b>Grade 9:</b><br/>2 x booklets for Mathematics and Language (Afrikaans and English).</p> | <b>YES</b>                                                                                                   | <b>NO</b> |
| 1.1.3     | For year one, the main testing instruments will be developed. For year two sections of the testing instruments will be reviewed and adjusted, for year three other sections of the instruments reviewed and adjusted. The service provider will recommend areas to be adjusted. This will be based on item performance within the instruments. The WCED will provide details and approve the required / recommended changes in each year.                                                                                                                                                                                  | <b>YES</b>                                                                                                   | <b>NO</b> |

| Paragraph | SPECIFICATION                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | INDICATION OF COMPLIANCE                                                                                     |    |
|-----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|----|
|           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | By indicating <b>Yes</b> within this column, the bidder confirms that it will meet the specified deliverable |    |
| 1.1.4     | <p>All instruments must be piloted and be subjected to Rasch Analysis. Reports of the pilot and the Rasch will be submitted to the WCED before the testing instruments are accepted. High level details of the pilot include:</p> <ul style="list-style-type: none"> <li>• Overall planning testing activities including tasks, milestones and timelines.</li> <li>• Pilot Testing conducted between 9 – 12 June 2025.</li> <li>• Pilot sites to be conducted outside the Western Cape province,</li> <li>• Maintain a high level of confidentiality.</li> <li>• Pilot scope to be aligned with methodology that produces quality instruments</li> <li>• Pilot scope to be approved by WCED.</li> <li>• Provide benchmarks for measuring the instrument's impact against baseline data.</li> <li>• Provide an analysis report of the instrument based on collected data to assess the instrument's effectiveness.</li> <li>• The report must include details of Instrument adjustment</li> </ul> | YES                                                                                                          | NO |
| 1.2       | <b>Testing material as indicated in paragraph 1.1.2 to 1.1.4 above includes the following:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                                                                              |    |
| 1.2.1     | Produce question papers in the different Language of Learning and Teaching (LOLT) as specified.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | YES                                                                                                          | NO |
| 1.2.2     | Provide memoranda for each question paper in its LOLT.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | YES                                                                                                          | NO |
| 1.2.3     | <p>The Assessment Framework for each item in the test instrument must include indications of:</p> <ul style="list-style-type: none"> <li>(i) item difficulty;</li> <li>(ii) learning area targeted;</li> <li>(iii) skill tested;</li> <li>(iv) projected grade level of the item;</li> <li>(v) cognitive levels;</li> <li>(vi) assessment standard and</li> <li>(vii) concepts tested.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | YES                                                                                                          | NO |

| Paragraph   | SPECIFICATION                                                                                                                                                                                                                                                                                                                                                                  | INDICATION OF COMPLIANCE                                                                                     |           |
|-------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|-----------|
|             |                                                                                                                                                                                                                                                                                                                                                                                | By indicating <b>Yes</b> within this column, the bidder confirms that it will meet the specified deliverable |           |
| 1.2.4       | In the second and third year of the contract when changes are initiated at Item level specification, it must be indicated how the item has been changed and possible interpretation implications.                                                                                                                                                                              | <b>YES</b>                                                                                                   | <b>NO</b> |
| 1.2.5       | The assessment standard and content tested for each item must be indicated.                                                                                                                                                                                                                                                                                                    | <b>YES</b>                                                                                                   | <b>NO</b> |
| <b>1.3.</b> | <b>To produce the items indicated in paragraph 1.1.2 to 1.1.4 the service provider will:</b>                                                                                                                                                                                                                                                                                   |                                                                                                              |           |
| 1.3.1       | <b>Graphics in the Test Instruments</b><br>Use high resolution graphics, working in collaboration with the appointed Test Administrator.                                                                                                                                                                                                                                       | <b>YES</b>                                                                                                   | <b>NO</b> |
| 1.3.2       | <b>Equivalence of Test Instruments</b><br>Ensure that all the test instruments are equivalent in structure, cognitive demand and levels of difficulty across languages and grades.                                                                                                                                                                                             | <b>YES</b>                                                                                                   | <b>NO</b> |
| 1.3.3       | <b>Comparability of Test Instruments</b><br>Ensure that all the test instruments are comparable to previous tests years (2021 – 2024) and across languages.                                                                                                                                                                                                                    | <b>YES</b>                                                                                                   | <b>NO</b> |
| 1.3.4       | <b>Testing Framework and Item Mapping</b><br>For the subsequent years, follow the 2021 Testing Framework and item mapping. Ensure that the Grades 3, 6 & 9 tests are accompanied by a summary report indicating the number of items per grade, knowledge and skill areas tested, item level of difficulty (Easy/Medium/Difficult) and the identification of valid distractors. | <b>YES</b>                                                                                                   | <b>NO</b> |
| 1.3.5       | <b>Official Sign-Off</b><br>Ensure that the Grades 3, 6 & 9 tests are print-ready and that the final copies are signed-off before they are printed (2025-2028).                                                                                                                                                                                                                | <b>YES</b>                                                                                                   | <b>NO</b> |

| Paragraph | SPECIFICATION                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | INDICATION OF COMPLIANCE                                                                                     |           |
|-----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|-----------|
|           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | By indicating <b>Yes</b> within this column, the bidder confirms that it will meet the specified deliverable |           |
| 1.3.6     | <b>Facilitation of the Memoranda</b><br>Facilitate the Grades 3, 6 & 9 memoranda with the appointed test administration service providers. This normally takes place in the first week of October of every testing year.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | <b>YES</b>                                                                                                   | <b>NO</b> |
| 1.3.7     | <b>Review of test instruments</b><br>The extent of the review and recommendation by the service provider will include but not limited to the following: <ul style="list-style-type: none"> <li>• Review and correct the misfit items as indicated by the Rasch analysis.</li> <li>• Review and replace passage/s from the unadjusted booklet.</li> <li>• Review / assess and replace items that have been in the test the longest period.</li> <li>• Develop questions in line with the proposed framework covering the new passage.</li> <li>• Review and adjust the memoranda accordingly.</li> </ul>                                                                                                                                                                       | <b>YES</b>                                                                                                   | <b>NO</b> |
| 1.3.8     | Draw up a detailed project plan. The plan will include, but not limited to, the following areas: <ul style="list-style-type: none"> <li>• Key deliverables and timelines.</li> <li>• Baseline data collection and analysis.</li> <li>• Monthly project team meetings involving key officials.</li> <li>• Development of test instrument.</li> <li>• New instrument testing framework.</li> <li>• The printing of the test instruments</li> <li>• The piloting of test instruments at schools</li> <li>• The memorandum development to be used by the markers</li> <li>• Detailed item analysis based on pilot test results.</li> <li>• Instrument adjustment timelines.</li> <li>• Final report submitted by the Service Provider is reviewed and approved by WCED</li> </ul> | <b>YES</b>                                                                                                   | <b>NO</b> |

| Paragraph | SPECIFICATION                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | INDICATION OF COMPLIANCE                                                                                     |    |
|-----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|----|
|           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | By indicating <b>Yes</b> within this column, the bidder confirms that it will meet the specified deliverable |    |
| 1.3.9     | <p><b>Meet the following timeframes:</b></p> <p><b>31 MAY 2025:</b> submit draft instruments and assessment framework.</p> <p><b>9 – 12 JUNE 2025:</b> Pilot Testing conducted.</p> <p><b>23 JUNE 2025:</b> submit final Instruments.</p> <p><b>18 JULY 2025:</b> Sign-off print copies at the printing company in Cape Town (following year's dates negotiable).</p> <p><b>03 OCTOBER 2025:</b> Facilitate the Memo to Chief and Senior Markers at the marking venue in Cape Town. (date negotiable)</p> <p><b>13 FEBRUARY 2026:</b> Participate in the Review process with the WCED and the Test Administrators.</p> <p>Detailed sign-off and approval procedures to be maintained.</p> | YES                                                                                                          | NO |
| 1.3.10    | <p><b>Meeting requirements</b></p> <p><b>Service provider to be available for meeting request as follows:</b></p> <ul style="list-style-type: none"> <li>(i) A minimum of two (2) in person meetings at a venue identified by the WCED within the Cape Town Central Business District.</li> <li>(ii) Service provider must be available for virtual meetings as and when required by the WCED.</li> </ul>                                                                                                                                                                                                                                                                                 | YES                                                                                                          | NO |

| Paragraph | SPECIFICATION                                                                                                                                                                                                                                                                          | INDICATION OF COMPLIANCE                                                                                     |
|-----------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|
|           |                                                                                                                                                                                                                                                                                        | By indicating <b>Yes</b> within this column, the bidder confirms that it will meet the specified deliverable |
| <b>2.</b> | <b>BID EVALUATION CRITERIA</b>                                                                                                                                                                                                                                                         |                                                                                                              |
| 2.1       | The Bid will not be considered without the following documents or compliance to the requirements stated:                                                                                                                                                                               |                                                                                                              |
| 2.1.1     | Completed and signed WCBD 1 Invitation to Bid.                                                                                                                                                                                                                                         |                                                                                                              |
| 2.1.2     | Fully completed WCBD 3.1 Pricing Schedule and hard copy of a detailed cost breakdown.                                                                                                                                                                                                  |                                                                                                              |
| 2.1.3     | Fully completed WCBD 3.4 Specification Compliance Schedule.                                                                                                                                                                                                                            |                                                                                                              |
| 2.1.4     | Submit a detailed project plan as specified in per paragraph 1.3.8                                                                                                                                                                                                                     |                                                                                                              |
| 2.1.5     | Attendance of compulsory Information Session.                                                                                                                                                                                                                                          |                                                                                                              |
| 2.1.6     | Registration on Central Supplier Database (CSD).                                                                                                                                                                                                                                       |                                                                                                              |
| 2.1.7     | Registration on the Western Cape Supplier Evidence Bank (WCSEB) and Central Supplier Database (CSD) at the time that this bid is awarded.                                                                                                                                              |                                                                                                              |
| 2.1.8     | Where applicable (Joint Ventures and Consortia) submission of a duly signed Memorandum of Understanding detailing the roles and responsibilities of all parties. In such cases all the parties must be actively registered on the Western Cape Supplier Evidence Bank (WCSEB) and CSD. |                                                                                                              |
|           | <b>Failure to submit the above documents and compliance with stated requirements will render the bid non-compliant</b>                                                                                                                                                                 |                                                                                                              |

| Paragraph  | SPECIFICATION                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | INDICATION OF COMPLIANCE                                                                                     |
|------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|
|            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | By indicating <b>Yes</b> within this column, the bidder confirms that it will meet the specified deliverable |
| <b>2.2</b> | <b>MINIMUM REQUIREMENTS OF THE BID.</b><br><br><b><u>The bidder MUST submit with the bidding document, at bid closure, the following: (Failure to submit the item listed below, will render a bid non-compliant)</u></b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                                                                                              |
| 2.2.1      | A profile of the bidding entity (not of individual persons), reflecting the following: <ul style="list-style-type: none"> <li>• Evidence of participation in instrument development for standardised testing of school learners, in South Africa, for national and international studies, indicating:</li> <li>• Numbers of learners involved.</li> <li>• An executive summary of each project.</li> <li>• Name and contact details of the contact person of the client(s) that can serve as a referee.</li> <li>• Evidence of experience in Item benchmarking, item response theory and the Rasch Theory.</li> <li>• Evidence of piloting test instrument</li> </ul>                                                                                                                                                                                                                          |                                                                                                              |
| 2.2.2      | CVs of individuals who will be designated as project manager and chief examiner per grade indicating the following: <ul style="list-style-type: none"> <li>• Knowledge of the Curriculum and Assessment Policy Statement (CAPS) and Annual Teaching Plans (ATP's) for the Grades and Phases in question.</li> <li>• Evidence of participation in instrument development for standardised testing of school learners, in South Africa, for national and international studies, indicating: <ul style="list-style-type: none"> <li>○ Numbers of learners involved.</li> <li>○ An executive summary of each project.</li> <li>○ Evidence of the individuals' participation in instrument development and or test administration for national and international studies.</li> <li>○ Evidence of experience in Item benchmarking, item response theory and the Rasch Theory.</li> </ul> </li> </ul> |                                                                                                              |

2.3 EVALUATION AND SELECTION CRITERIA

Evaluation will be based on a point system, with the criteria being scored out of 40 points with a minimum threshold of 20 points. Bids that do not meet the minimum threshold will not be evaluated further. Each element is weighted as shown in the table below:

2.3.1

| CRITERIA (MAXIMUM POINTS SCORING OF 40)                                                                                                                  |           |
|----------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|
| <b>COMPANY EXPERIENCE (Total points for company experience):</b>                                                                                         | <b>20</b> |
| Total Projects Managed                                                                                                                                   |           |
| Evidence of participation in instrument development for standardised testing of school learners, in South Africa, for national and international studies |           |
| • 1 project                                                                                                                                              | 4         |
| • 2 projects                                                                                                                                             | 8         |
| • 3 projects                                                                                                                                             | 12        |
| • 4 projects                                                                                                                                             | 16        |
| • 5 or more projects                                                                                                                                     | 20        |
|                                                                                                                                                          |           |

2.3.2

| INDIVIDUAL EXPERIENCE (MAX 4 PEOPLE - ONE POST PER PERSON):                                                                                              |           |            |            |            | 20                 |
|----------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|------------|------------|------------|--------------------|
| Evidence of participation in instrument development for standardised testing of school learners, in South Africa, for national and international studies |           |            |            |            |                    |
| Staff                                                                                                                                                    | 1 project | 2 projects | 3 projects | 4 projects | 5 or more projects |
| Project Manager                                                                                                                                          | 1         | 2          | 3          | 4          | 5                  |
| Chief Examiner Grade 3                                                                                                                                   | 1         | 2          | 3          | 4          | 5                  |
| Chief Examiner Grade 6                                                                                                                                   | 1         | 2          | 3          | 4          | 5                  |
| Chief Examiner Grade 9                                                                                                                                   | 1         | 2          | 3          | 4          | 5                  |

Only offers that first meet the minimum threshold of 20 points will be evaluated further according to the following preferential procurement points system:

2.3.3

All compliant offers will be ranked according to the point system indicated below in terms of the preferential procurement regulations 2022:

| Evaluation Element | Point |
|--------------------|-------|
| 1. Price           | 80    |
| 2. B-BBEE Points   | 20    |
|                    | 100   |

|       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|-------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 2.4   | <p><b>The Bidder <u>must comply</u> with the following requirements, which will <u>not necessarily invalidate the bid</u>:</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 2.4.1 | <p>Completion in full of the WCBD 4 Declaration of interest form. This form must be certified by a Commissioner of Oaths</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 2.4.2 | <p>Declare any related party interest on the WCBD 4. The declaration must reflect whether the bidder or any of the directors/shareholders/members/business partners or associates of the bidding entity have any interest in any other related companies, whether these related companies are bidding for this contract or not.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 2.4.3 | <p>The regulations promulgated in terms of the Public Finance Management Act (PFMA) 1999, allows an accounting officer to disregard the bid of any bidder if that bidder, or any of its directors has (amongst others):</p> <ul style="list-style-type: none"> <li>(i) abused the institution's supply chain management system</li> <li>(ii) committed fraud or any other improper conduct in relation to such system.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 2.4.4 | <p>Consequently, the Bidder is required to submit <u>full and complete</u> information in respect of the declaration of interest.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 2.4.5 | <p>An original or certified black &amp; white copy of the company registration documents, i.e. CK 1, CK 2.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 2.4.6 | <p>The Preferential Procurement Regulations, 2022 effective from 16 January 2023 will apply in this bid. Please acquaint yourself with such Regulations. Please note that points for BB-BEE status level of contribution will only be awarded to bidders who claim such points through the completion of the WCD 6.1 Preference Points Claim Form(attached), in full (and which you are required to read in its entirety) and who submit proof of such BB-BEE status level of contribution, which can be in the form of the following:</p> <ul style="list-style-type: none"> <li>(a) a B-BBEE Verification Certificate issued by a Verification Agency accredited by the South African Accreditation System (SANAS) and which is <u>applicable for the sector within which the bid is submitted</u> (for example, a B-BBEE certificate for the catering and Hospitality sector is not applicable for Transport and Storage bids); or</li> <li>(b) an affidavit, in the form prescribed by the Department of Trade and Industry (the dti) which confirms the annual total revenue and level of black ownership together with the sector in respect of which it is issued. This form is obtainable on the dti website; or</li> <li>(c) an affidavit issued by Companies Intellectual Property Commission (CIPC)</li> </ul> |
| 2.4.7 | <p>When completing the Preference Points claim form attached to this bid, bidders must note the conditions pertaining to the award of preference points and therefore the form has to be completed in full (including any sub-contracting, which will be relevant in the event of the bidder not undertaking delivery of the entire contract itself):</p> <ul style="list-style-type: none"> <li>(a) <b>At bidding phase:</b></li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |

| Paragraph  | SPECIFICATION                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | INDICATION OF COMPLIANCE                                                                                     |           |
|------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|-----------|
|            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | By indicating <b>Yes</b> within this column, the bidder confirms that it will meet the specified deliverable |           |
| 2.4.8      | <p>Bidders may not be awarded points or B-BBEE status level of contribution if the tender documents indicate that the tenderer intends subcontracting more than 25% of the value of the contract to any other person not qualifying for at least the points that the tenderer qualifies for, unless the intended subcontractor is an EME that has the capability to execute the contract.</p> <p>(b) <b>Post award phase:</b></p> <p>After the award of this contract, the successful bidder may only enter into a subcontracting arrangement with the approval of the WCED. After the award of this bid, the successful bidder may not sub-contract more than 25% of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level of contributor that the bidder qualifies for, unless the intended sub-contractor is an EME that has the capability and ability to execute the sub-contract.</p> <p>The Master Registration Number (Supplier number) to enable the WCED to verify the bidder's tax compliance status on the CSD.</p> |                                                                                                              |           |
| <b>3.</b>  | <b>THE SUCCESSFUL SERVICE PROVIDER MUST (IN ADDITION TO PARAGRAPH 1.3):</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                              |           |
| <b>3.1</b> | Submit piloting plan which will be finalised and agreed upon together with the WCED once the tender has been awarded.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | <b>YES</b>                                                                                                   | <b>NO</b> |
| <b>3.2</b> | Attend project and review meetings, as required by the WCED. Project meeting dates will be provided by the WCED. Detailed minutes to be recorded by the service provider, signed-off and shared after every meeting within two weeks.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | <b>YES</b>                                                                                                   | <b>NO</b> |
| <b>3.3</b> | Align project plan and deliverables with timeframes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | <b>YES</b>                                                                                                   | <b>NO</b> |
| <b>3.4</b> | <p>Maintain a high level of confidentiality and security.</p> <p>(i) Data must be kept safe in compliance to the Protection of Personal Information Act (POPI Act), 2013</p> <p>(ii) The Service Provider may not disclose any information or data to any third Party unless approval is granted by the Western Cape Education Department.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | <b>YES</b>                                                                                                   | <b>NO</b> |
| <b>3.5</b> | Ensure framework alignment between test instruments within each grade as per paragraph 1.1.2 and 1.1.3                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | <b>YES</b>                                                                                                   | <b>NO</b> |

| Paragraph  | SPECIFICATION                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | INDICATION OF COMPLIANCE                                                                                     |           |
|------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|-----------|
|            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | By indicating <b>Yes</b> within this column, the bidder confirms that it will meet the specified deliverable |           |
| <b>3.6</b> | <p>Comply with WCED Circular 001/2023: Vetting officials against the National Register for Sexual Offences (NSRO), (see attached Annexure B).</p> <p>i) According to the Criminal Law (Sexual Offences and Related Matters) Amendment Act, 2021 (Act 13 Of 2021), all officials and any other persons coming into contact with Learners must be vetted against the NSRO and the National Child Protection Register to determine whether their particulars have been included on said Registers.</p> <p>ii) The vetting service is for the account of the service provider</p> <p>iii) Proof that all staff employed for this contract has been vetted must be submitted and proof must be submitted prior to commencement of duty. Thereafter every new employee (permanent/ contracted/ casual) must assume duty with proof of being vetted.</p> | <b>YES</b>                                                                                                   | <b>NO</b> |
| <b>4.</b>  | <b>THE WCED WILL:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                              |           |
| <b>4.1</b> | Provide the successful service provider with the LoLT requirements for instruments development.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                                                                              |           |
| <b>4.2</b> | Provide the 2019 to 2021 Grades 3, 6 & 9 testing material as well as the datasets of the results.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                                                                                                              |           |
| <b>4.3</b> | Avail the details of the appointed Test Administration service providers once the WCED has concluded a contract for the required service.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                                                                                                              |           |
| <b>4.4</b> | Take ownership and title of all Intellectual Property rights in all works first developed or created by the Service Provider prior to the Commencement Date and handed to the Department during the term of this Agreement, shall remain vested with the Department.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                              |           |
| <b>5.</b>  | <b>CONTRACT MONITORING</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                                                                                              |           |
| <b>5.1</b> | The Project Manager will monitor the deliverables as per paragraph 1.3.8 and paragraph 6.1-6.2 and payment will be made on successful completion of the deliverables as specified for each portion of payment.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                                                                                                              |           |

| Paragraph                                                                                                                      | SPECIFICATION                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | INDICATION OF COMPLIANCE                                                                                                             |        |        |                                                                                                                                |                                                                                                                                      |                                                                                                                                      |                                                                    |                                                                 |                                                                 |                                                                                               |                                                                                             |                                                                                             |                                                                                                     |                                                                                                  |                                                                                                  |  |
|--------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|--------|--------|--------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------|-----------------------------------------------------------------|-----------------------------------------------------------------|-----------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------|--|
|                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | By indicating <b>Yes</b> within this column, the bidder confirms that it will meet the specified deliverable                         |        |        |                                                                                                                                |                                                                                                                                      |                                                                                                                                      |                                                                    |                                                                 |                                                                 |                                                                                               |                                                                                             |                                                                                             |                                                                                                     |                                                                                                  |                                                                                                  |  |
| 6.                                                                                                                             | PAYMENT CONDITIONS:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                                                                                                                                      |        |        |                                                                                                                                |                                                                                                                                      |                                                                                                                                      |                                                                    |                                                                 |                                                                 |                                                                                               |                                                                                             |                                                                                             |                                                                                                     |                                                                                                  |                                                                                                  |  |
| 6.1                                                                                                                            | <table><thead><tr><th>Year 1</th><th>Year 2</th><th>Year 3</th></tr></thead><tbody><tr><td>25% after the submission of the final test instruments as well as the reports on the adjustments made on <b>23 June 2025</b>.</td><td>25% after the submission of the final revised testing materials as well as the reports on the adjustments made in <b>June 2026</b>.</td><td>25% after the submission of the final revised testing materials as well as the reports on the adjustments made in <b>June 2027</b>.</td></tr><tr><td>25% after the signing-off of print copies on <b>18 July 2025</b>.</td><td>25% after the signing-off of print copies on <b>July 2026</b>.</td><td>25% after the signing-off of print copies on <b>July 2027</b>.</td></tr><tr><td>25% after the facilitation of the Memo to Chief and Senior Markers on <b>3 October 2025</b>.</td><td>25% after the facilitation of the Memo to Chief and Senior Markers on <b>October 2026</b>.</td><td>25% after the facilitation of the Memo to Chief and Senior Markers on <b>October 2027</b>.</td></tr><tr><td>25% after the review process with the WCED and the Test Administrators on <b>13 February 2026</b>.</td><td>25% after the review process with the WCED and the Test Administrators on <b>February 2027</b>.</td><td>25% after the review process with the WCED and the Test Administrators on <b>February 2028</b>.</td></tr></tbody></table> | Year 1                                                                                                                               | Year 2 | Year 3 | 25% after the submission of the final test instruments as well as the reports on the adjustments made on <b>23 June 2025</b> . | 25% after the submission of the final revised testing materials as well as the reports on the adjustments made in <b>June 2026</b> . | 25% after the submission of the final revised testing materials as well as the reports on the adjustments made in <b>June 2027</b> . | 25% after the signing-off of print copies on <b>18 July 2025</b> . | 25% after the signing-off of print copies on <b>July 2026</b> . | 25% after the signing-off of print copies on <b>July 2027</b> . | 25% after the facilitation of the Memo to Chief and Senior Markers on <b>3 October 2025</b> . | 25% after the facilitation of the Memo to Chief and Senior Markers on <b>October 2026</b> . | 25% after the facilitation of the Memo to Chief and Senior Markers on <b>October 2027</b> . | 25% after the review process with the WCED and the Test Administrators on <b>13 February 2026</b> . | 25% after the review process with the WCED and the Test Administrators on <b>February 2027</b> . | 25% after the review process with the WCED and the Test Administrators on <b>February 2028</b> . |  |
| Year 1                                                                                                                         | Year 2                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Year 3                                                                                                                               |        |        |                                                                                                                                |                                                                                                                                      |                                                                                                                                      |                                                                    |                                                                 |                                                                 |                                                                                               |                                                                                             |                                                                                             |                                                                                                     |                                                                                                  |                                                                                                  |  |
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| 25% after the signing-off of print copies on <b>18 July 2025</b> .                                                             | 25% after the signing-off of print copies on <b>July 2026</b> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | 25% after the signing-off of print copies on <b>July 2027</b> .                                                                      |        |        |                                                                                                                                |                                                                                                                                      |                                                                                                                                      |                                                                    |                                                                 |                                                                 |                                                                                               |                                                                                             |                                                                                             |                                                                                                     |                                                                                                  |                                                                                                  |  |
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| 25% after the review process with the WCED and the Test Administrators on <b>13 February 2026</b> .                            | 25% after the review process with the WCED and the Test Administrators on <b>February 2027</b> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | 25% after the review process with the WCED and the Test Administrators on <b>February 2028</b> .                                     |        |        |                                                                                                                                |                                                                                                                                      |                                                                                                                                      |                                                                    |                                                                 |                                                                 |                                                                                               |                                                                                             |                                                                                             |                                                                                                     |                                                                                                  |                                                                                                  |  |
| 6.2                                                                                                                            | The successful service provider must submit a valid and original tax invoice to the <b>Director: Research</b> for payment. The WCED will pay after certification that the service required was rendered satisfactorily. The payment will be made within 30 days, after receipt of the valid tax invoice.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                                                                                                                      |        |        |                                                                                                                                |                                                                                                                                      |                                                                                                                                      |                                                                    |                                                                 |                                                                 |                                                                                               |                                                                                             |                                                                                             |                                                                                                     |                                                                                                  |                                                                                                  |  |
| 7.                                                                                                                             | GENERAL CONDITIONS OF CONTRACT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                                                                      |        |        |                                                                                                                                |                                                                                                                                      |                                                                                                                                      |                                                                    |                                                                 |                                                                 |                                                                                               |                                                                                             |                                                                                             |                                                                                                     |                                                                                                  |                                                                                                  |  |
| 7.1                                                                                                                            | This contract will be governed through the General Conditions of Contract attached to this bid document                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                      |        |        |                                                                                                                                |                                                                                                                                      |                                                                                                                                      |                                                                    |                                                                 |                                                                 |                                                                                               |                                                                                             |                                                                                             |                                                                                                     |                                                                                                  |                                                                                                  |  |
| 7.2                                                                                                                            | Bidders must note that the penalties intended through clause 22 of the General Conditions of Contract, which forms part of the contract, will be imposed in the execution of this contract. Consequently, bidders must acquaint themselves with paragraphs 21 – 23 of the General Conditions of Contract which relates to the suppliers' performance on the contract. Bidders must note these conditions upfront to prevent their business and its' directors/members/shareholders from possibly being restricted to do business with the public sector.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                                                                                                                      |        |        |                                                                                                                                |                                                                                                                                      |                                                                                                                                      |                                                                    |                                                                 |                                                                 |                                                                                               |                                                                                             |                                                                                             |                                                                                                     |                                                                                                  |                                                                                                  |  |

| Paragraph | SPECIFICATION                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | INDICATION OF COMPLIANCE                                                                                     |
|-----------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|
|           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | By indicating <b>Yes</b> within this column, the bidder confirms that it will meet the specified deliverable |
| <b>8.</b> | <b>SPECIAL CONDITIONS OF THIS BID</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                              |
| 8.1       | The WCED remains committed to the project but reserves the right to terminate the contract if circumstances or events beyond the department's control arise.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                                                                                                              |
| <b>9.</b> | <b>COMPULSORY INFORMATION SESSION</b><br><br>A compulsory information session will be held on <b>20 January 2025 AT 12H00</b> at the <b>WCED, HEAD OFFICE, 1 NORTH WHARF SQUARE, 2 LOWER LOOP STREET, FORESHORE, CAPE TOWN.</b> Potential bidders, who arrive <b><u>more than 15 minutes later</u></b> than the advertised commencement time of the information session, <b>will not be allowed into the venue. This is a compulsory information session and failure to attend the information session will invalidate the bid offer. Please bring with ID document for access purposes.</b> The purpose of the information session shall be to highlight the pricing procedure, enable the potential successful service provider to acquaint him/herself with the requirements of the WCED and completion of the Bid documents. Bid documents must be downloaded from the e-tenders portal: <a href="http://www.etenders.gov.za">www.etenders.gov.za</a> before the information session. <b><u>NO BID DOCUMENTS WILL BE ISSUED BY THE WCED.</u></b> |                                                                                                              |

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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;

***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.*

**"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.

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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<br>(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<br>(Where a director is a shareholder, both should be confirmed) | IDENTITY NUMBER | PERSONAL TAX REFERENCE NO. | PERCENTAGE INTEREST IN THE ENTITY |
|-----------|------------------------------------------------------------------------------|-----------------|----------------------------|-----------------------------------|
|           |                                                                              |                 |                            |                                   |
|           |                                                                              |                 |                            |                                   |
|           |                                                                              |                 |                            |                                   |
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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?<br>(If yes, refer to <b>Public Service Circular EIM 1/2016</b> to exercise the listed actions) | NO | YES |
| <b>B2.</b> | Are any employees of the entity also employees of an organ of state?<br>(If yes complete <b>Table B</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?<br>(If yes complete <b>Table B</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/<br>ENTITY OF<br>EMPLOYMENT | DESIGNATION/<br>RELATIONSHIP TO<br>BIDDER** | INSTITUTION<br>EMPLOYEE NO./<br>PERSAL NO.<br>(Indicate if not<br>known) |
|-----------------------|-----------------|----------------------------------------|---------------------------------------------|--------------------------------------------------------------------------|
|                       |                 |                                        |                                             |                                                                          |
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| <b>SECTION C: PERFORMANCE MANAGEMENT AND BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES</b> |                                                                                                                |    |     |
|----------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------|----|-----|
| To enable the prospective bidder to provide evidence of past and current performance.        |                                                                                                                |    |     |
| <b>C1.</b>                                                                                   | Did the entity conduct business with an organ of state in the last twelve months?<br>(If yes complete Table C) | NO | YES |

**C2. TABLE C**

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

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

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

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

I, ..... hereby swear/affirm;

- i. that the information disclosed above is true and accurate;
- ii. that I 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 placed thereon in my presence.

.....  
SIGNATURE FULL NAMES Commissioner of Oaths

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

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

Business Address: .....

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

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

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

### 1. DEFINITIONS

- 1.1 **"acceptable tender"** means any tender which, in all respects, complies with the specifications and conditions of tender as set out in the tender document.
- 1.2 **"affidavit"** is a type of verified statement or showing, or in other words, it contains a verification, meaning it is under oath or penalty of perjury, and this serves as evidence to its veracity and is required for court proceedings.
- 1.3 **"all applicable taxes"** includes value-added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies;
- 1.4 **"B-BBEE"** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- 1.5 **"B-BBEE status level of contributor"** means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- 1.6 **"bid"** means a written offer on the official bid documents or invitation of price quotations and "tender" is the act of bidding /tendering;
- 1.7 **"Code of Good Practice"** means the generic codes or the sector codes as the case may be;
- 1.8 **"consortium or joint venture"** means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract;
- 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 Empowerment Act and promulgated in the *Government Gazette* on 11 October 2013;
- 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 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>B-BBEE STATUS LEVEL OF CONTRIBUTOR</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 organ of state.

### 3. ADJUDICATION USING A POINT SYSTEM

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

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

#### 4.1 POINTS AWARDED FOR PRICE

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

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

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

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

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                               |

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

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

## 7. BID DECLARATION

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

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

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

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

## 9. SUB-CONTRACTING

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

- 9.1.1 If yes, indicate:

(i) what percentage of the contract will be subcontracted? .....%

(ii) the name of the sub-contractor? .....

(iii) the B-BBEE status level of the sub-contractor? .....

(iv) whether the sub-contractor is an EME or QSE? **YES/NO** *(delete which is not applicable)*

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

## 10. DECLARATION WITH REGARD TO COMPANY/FIRM

10.1 Name of company/ entity: .....

10.2 VAT registration number: .....

10.3 Company Registration number: .....

### 10.4 TYPE OF COMPANY/ FIRM

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

[SELECT APPLICABLE ONE]

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

- (a) The Western Cape Government reserves the right to audit the B-BBEE status claim submitted by the bidder.
- (b) As set out in Section 13O of the B-BBEE Act as amended, any misrepresentation constitutes a criminal offence. A person commits an offence if that person knowingly:
  - (i) misrepresents or attempts to misrepresent the B-BBEE status of an enterprise;
  - (ii) provides false information or misrepresents information to a B-BBEE Verification Professional in order to secure a particular B-BBEE status or any benefit associated with compliance to the B-BBEE Act;
  - (iii) provides false information or misrepresents information relevant to assessing the B-BBEE status of an enterprise to any organ of state or public entity; or
  - (iv) engages in a fronting practice.
- (c) If a B-BBEE verification professional or any procurement officer or other official of an organ of state or public entity becomes aware of the commission of, or any attempt to commit any offence referred to in paragraph 10.5 (a) above will be reported to an appropriate law enforcement agency for investigation.

- (d) Any person convicted of an offence by a court is liable in the case of contravention of 10.5 (b) to a fine or to imprisonment for a period not exceeding 10 years or to both a fine and such imprisonment or, if the convicted person is not a natural person to a fine not exceeding 10 per cent of its annual turnover.
- (e) The purchaser may, if it becomes aware that a bidder may have obtained its B-BBEE status level of contribution on a fraudulent basis, investigate the matter. Should the investigation warrant a restriction be imposed, this will be referred to the National Treasury for investigation, processing and imposing the restriction on the National Treasury's List of Restricted Suppliers. The bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, may be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the audi alteram partem (hear the other side) rule has been applied.
- (f) The purchaser may, in addition to any other remedy it may have –
  - (i) disqualify the person from the bidding process;
  - (ii) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
  - (iii) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation; and
  - (iv) forward the matter for criminal prosecution.
- (g) The information furnished is true and correct.
- (h) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 2 of this form.

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

**DATE:** .....

**ADDRESS:** .....

.....

**WITNESSES:**

1. ....

2. ....