



## employment & labour

Department:  
Employment and Labour  
REPUBLIC OF SOUTH AFRICA



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### REQUEST FOR PROPOSAL FOR THE APPOINTMENT OF PANEL OF SERVICE PROVIDERS TO PROVIDE PROJECT MONITORING SERVICES AND PROJECT MANAGEMENT OFFICE SERVICES TO THE LABOUR ACTIVATION PROGRAMME IN THE UNEMPLOYMENT INSURANCE FUND FOR THE PERIOD OF THIRTY-SIX (36) MONTHS

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**TENDER NUMBER** : UIF2/24/25

**DATE ISSUED** : 14/06/2024

**CLOSING DATE AND TIME** : 10/07/2024 at 11h00

**BID VALIDITY PERIOD** : 180 Calendar days

  

**TENDER BOX ADDRESS** : Unemployment Insurance Fund  
ABSA TOWERS  
Ground Floor  
230 Lillian Ngoyi Street  
Pretoria  
0002

  

**TENDER BRIEFING SESSION** : Refer to paragraph 4 on page 4

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WORKING FOR YOU

## **A BID PROCEDURES AND APPLICABLE LEGISLATION**

### **1. INTRODUCTION**

The Unemployment Insurance Fund (UIF) is a schedule 3A public entity in terms of the Public Finance Management Act (PFMA), Act 1 of 1999. The supreme mandate of the Unemployment Insurance Fund (UIF) is derived from section 27(1) (c) of the Constitution of the Republic of South Africa. The Unemployment Insurance Fund provides social security to its contributors in line with section 27(1) (c) which states that "everyone has the right to social security".

The mandate of the Unemployment Insurance Fund is stated in the Unemployment Insurance Act, No 63 of 2001 (as amended). The Unemployment Insurance Fund was established in terms of section 4(1) of the Unemployment Insurance Act. The Act empowers the Unemployment Insurance Fund to register all employers and employees in South Africa and pay those who qualify for unemployment insurance benefits.

### **2. PURPOSE OF THIS REQUEST FOR PROPOSALS (RFP)**

The purpose of this Request for Proposal (RFP) is to solicit proposals from potential bidder(s) for the *services of* overseeing and managing labour activation projects for the Unemployment Insurance Fund for a period of thirty-six months. Labour activation programmes play a vital role in driving economic growth and social development by implementing projects that result in employment, however the UIF has encountered challenges in effectively executing these projects.

This RFP document details and incorporates, as far as possible, the tasks and responsibilities of the potential bidder required by the Unemployment Insurance Fund for the provision of required services.

This RFP does not constitute an offer to do business with the Unemployment Insurance Fund, but merely serves as an invitation to bidder(s) to facilitate a requirements-based decision process.

### **3. LEGISLATIVE FRAMEWORK OF THE BID**

#### **3.1 Tax Legislation**

In terms of National Treasury Instruction No. 09 of 2017/18, no tender may be awarded to any bidder whose Tax matters have not been declared by the South African Revenue Services (SARS) to be in order. Therefore, bidders must provide the Fund with the tax compliance PIN or the MAAA number obtainable when registering on the CSD. This is required in order for the Fund to verify the tax status of a bidder as part of the tender proposal. The bidder must also ensure that all sub-contractors (if applicable) are tax compliant.

It must be noted that bidders must not only be compliant when submitting a proposal to the Unemployment Insurance Fund but must remain compliant for the entire contract term with all applicable tax legislation, including but not limited to the Income Tax Act, 1962 (Act No. 58 of 1962) and Value Added Tax Act, 1991 (Act No. 89 of 1991).

#### **3.2 Unemployment Insurance Act, 63 of 2001 (as amended)**

The mandate of the Unemployment Insurance Fund is stated in the UIA. The UIF was established in terms of section 4(1) of the UIA No 63 of 2001 (as amended). The Act empowers the UIF to register all employers and employees in South Africa and pay those who qualify for unemployment insurance benefits.

#### **3.3 Procurement Legislation**

The Unemployment Insurance Fund has a detailed evaluation methodology premised on Treasury Regulation 16A3 promulgated under Section 76 of the Public Finance Management Act, 1999 (Act, No. 1 of 1999), the Preferential Procurement Policy Framework Act 2000 (Act, No.5 of 2000), and the Broad-Based Black Economic Empowerment Act, 2003 (Act, No. 53 of 2003), and the Unemployment Insurance Fund Act and the State Information Technology Agency Act, 1998 (Act No. 88 of 1998), as amended.

### 3.4 Technical Legislation and/or Standards

Bidder(s) should be cognisant of the legislation and/or standards specifically applicable to the required services.

## 4. BRIEFING SESSION

An on-site briefing and clarification session will be held 25 June 2024 to clarify to bidder(s) the scope and extent of work to be executed by the bidder. **Attendance is compulsory.** The address for the session is indicated on the front page of this document.

## 5. CLARIFICATION QUERIES

Bidders may raise any clarification queries and forward these via email to [UIFTenders@labour.gov.za](mailto:UIFTenders@labour.gov.za). The final date and time for receipt of clarification queries is 02 July 2024 at 15:00.

The UIF undertakes to respond to all queries duly received by 04 July 2024 at 16h00. All clarification queries received and responses provided will be uploaded on the National Treasury E-Tender Portal, the Government Tender Bulletin (if available) and the Department of Labour and Employment (DEL) website up to three (3) working days before the closing of the bid, unless there is a compulsory tender briefing session. Responses to clarification queries will only be emailed to those bidders who attended the compulsory session when applicable.

## 6. TIMELINE OF THE BID PROCESS

The period of validity of the tender and the withdrawal of offers, after the closing date and time is Hundred and Eighty (180) calendar days commencing from the tender closing date. Should it under exceptional circumstances be necessary to extend the validity period, bidders will be requested well in advance to agree to such extension. **Non-responsiveness by bidders, to the Fund's request for extension of validity periods, will be interpreted as acceptance by the bidder of the terms of the extension.**

The project timeframes of this bid are set out below:

**Table 1**

| Activity                                                                                                                               | Due Date     |
|----------------------------------------------------------------------------------------------------------------------------------------|--------------|
| <b>Advertisement of bid on National Treasury's E-tender portal, the Government Tender Bulletin (if available) and the DEL website:</b> | 14 June 2024 |
| <b>Briefing session, if applicable:</b>                                                                                                | 25 June 2024 |
| <b>Closing date for questions from prospective bidders relating the Bid:</b>                                                           | 02 July 2024 |
| <b>Bid/Tender closing date:</b>                                                                                                        | 10 July 2024 |

**Prospective bidders must also take note of the following:**

- 6.1 All dates and times in this bid document are South African standard times.
- 6.2 Any time or date in this bid is subject to change at the Unemployment Insurance Fund's discretion.
- 6.3 The establishment of a time or date in this bid does not create an obligation on the part of the Unemployment Insurance Fund to take any action, or create any right in any way for any bidder to demand that any action is taken on the date established.
- 6.4 The bidder accepts that, if the Unemployment Insurance Fund extends the deadline for the submission of bids (the Closing Date) for any reason, the requirements of this bid will apply equally to the extended deadline.

**7. CONTACT AND COMMUNICATION**

- 7.1 Bidder(s) can make enquiries in writing: e-mail **UIFTenders@labour.gov.za** regarding this bid, before the closure of the bid.
- 7.2 The delegated office of the Unemployment Insurance Fund may communicate with bidders where clarity is sought regarding the bidding process or the specifications as set out in this document, provided that such communication takes place prior to the closing date of the bid.

- 7.3 Bidders must note that communication with an official or a person acting in an advisory capacity for the Unemployment Insurance Fund in respect of the bid is discouraged between the closing date and the award of the bid.
- 7.4 Communication during this stage of the bid process can only take place between officials from the Fund and bidders in writing.
- 7.5 Whilst all due care has been taken in connection with the preparation of this bid, the Fund makes no representations or warranties that the content of the bid or any information communicated to or provided to Bidder(s) during the bidding process is, or will be, accurate, current or complete. The Unemployment Insurance Fund, and its employees and advisors will not be liable with respect to any information communicated that may not be accurate, current or complete.
- 7.6 If bidders find or reasonably believe they have found any discrepancy, ambiguity, error or inconsistency in this bid or any other information provided by the Unemployment Insurance Fund (other than minor clerical/administrative matters), such bidders must promptly notify the Fund in writing of such discrepancy, ambiguity, error or inconsistency in order to afford the Fund an opportunity to consider what corrective action is necessary (if any).
- 7.7 Any actual discrepancy, ambiguity, error or inconsistency in the bid or any other information provided by the Unemployment Insurance Fund will, if possible, be corrected and provided to all bidders without attribution to the bidders who provided the written notice.
- 7.8 All persons (including bidders obtaining or receiving the bid and any other information in connection with the bid or the tendering process) must keep the contents of the bid and other such information confidential, and not disclose or use the information except as required for the purpose of developing a tender proposal in response to this bid.

## **8. LATE BIDS**

Bids received after the closing date and time, at the address indicated in the bid document, will not be accepted for consideration and where practical, be returned unopened to the bidder(s). In terms of the Fund's policies, the closing time for all tenders is 11h00. Telkom's 1026 number is used to determine the accuracy of the closing time.

## **9. COUNTER CONDITIONS**

Bidders' attention is drawn to the fact that amendments to any of the bid conditions or setting of counter conditions by Bidders or qualifying any bid conditions may result in the invalidation of such bids.

## **10. FRONTING**

- 10.1** Government supports the spirit of broad based black economic empowerment and recognizes that real empowerment can only be achieved through individuals and businesses conducting themselves in accordance with the Constitution and in an honest, fair, equitable, transparent and legally compliant manner. Against this background, the Government condemn any form of fronting.
- 10.2** Should any of the fronting indicators as contained in the Guidelines on Complex Structures and Transactions and Fronting, issued by the Department of Trade and Industry, be established the onus would be on the bidder/contractor to prove that fronting does not exist. Failure to do so within a period of fourteen (14) working days from the date of notification may invalidate the bid/contract and may also result in the restriction of the bidder/contractor to conduct business with the public sector for a period not exceeding ten (10) years. This is in addition to any other remedies the Unemployment Insurance Fund may have against the bidder/contractor concerned.

## **11. SUPPLIER DUE DILIGENCE**

The Unemployment Insurance Fund reserves the right to conduct supplier due diligence prior to the final award or at any time during the contracting period to determine whether a bidder has the capability and ability to execute the contract. In this regard, the Fund may choose to conduct site visits and/or perform risk profile analysis and/or undertake financial viability exercises. Contractual arrangement may include the results of the due diligence audit.

## 12. SUBMISSION OF PROPOSALS

Bidders must take note of the following regarding the submission of proposals/bids:

- 12.1 Bid documents **must be sealed** and placed in the tender box at the aforesaid address on or prior to the closing date and time of the bid as indicated in this document. The responsibility to submit proposals before the bid closure date and time rests with the bidder. Bidders are therefore encouraged to ensure the method of delivery that they use for their respective bids will result in a timeous proposal submission in the UIF tender box;
- 12.2 Bid documents will only be considered if received by the Unemployment Insurance Fund and placed in the tender box prior to the closing date and time;
- 12.3 Bidders must complete and sign the bid register when placing a bid in the tender box;
- 12.4 The bidder(s) are required to submit three (3) sealed proposals: two (2) copies and one (1) original proposal by the closing date. Each file must clearly indicate whether it is the original or a copy and **sealed** separately for ease of reference during the evaluation process. **The bidders must ensure that original proposals are complete and that copies are exact replicas of the original.**
- 12.5 Files must clearly indicate the bidder's company name and details on each file cover.
- 12.6 **All bids must be completed in non-erasable ink.** Bidders are requested to initial each page of the tender document on the bottom right-hand corner. **All mistakes made within the bid proposal should also be initialled. In addition, all pages in the bid submission tender document should be numbered.**
- 12.7 For ease of reference during the evaluation process, **it is of utmost importance that bidders compile their proposals in the format as specified in Table 2 below:**

Table 2

| File Content                                                                                                                     |
|----------------------------------------------------------------------------------------------------------------------------------|
| Section 1:<br><br>Documents listed in Table 4, except for the pricing and specific goal documentation listed in Section 2 below. |
| Section 2:                                                                                                                       |

|                                                                                                                                                                                                                                                                                                                                                                                                                           |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>• SBD 3.3 form – Pricing Schedule (Annexure D)</li> <li>• An original or valid B-BBEE Certificate or a certified copy thereof issued by a verification agency accredited by SANAS or an affidavit if applicable whichever is applicable to the bidder.</li> <li>• A current valid CIPC certificate together with copies of the IDs of the directors who hold ownership.</li> </ul> |
| <p><b>Section 3:</b></p> <ul style="list-style-type: none"> <li>• Company Profile</li> <li>• Supplementary information such as Joint Venture Agreement(s) (if applicable); Sub-contracting Agreement(s) (if applicable); etc.</li> </ul>                                                                                                                                                                                  |
| <p><b>Section 4:</b></p> <p>Financial information as listed in paragraph 16.5</p>                                                                                                                                                                                                                                                                                                                                         |
| <p><b>Section 5:</b></p> <ul style="list-style-type: none"> <li>• Technical mandatory bid requirements are listed under PART B - Specification and Scope of Work.</li> <li>• Response to functionality criteria as indicated in Annexures A and B</li> </ul>                                                                                                                                                              |
| <p><b>Section 6:</b></p> <p>All other documents</p>                                                                                                                                                                                                                                                                                                                                                                       |

### **13. DURATION OF THE CONTRACT**

The successful bidder will be appointed for a maximum period of thirty six (36) months.

### **14. VETTING OF SERVICE PROVIDERS**

The successful bidder(s) will be security screened (vetted) prior to the commencement of the contract. Therefore, bidders must include copies of the Identity Documents (ID) of the persons who own, manage and control the company.

Bidders will be vetted in line with the Department of Employment and Labour (DEL) UIF policies.

## 15. LOCAL CONTENT

The framework, in section 2(1) of the Act, does not provide for local production and content per se but refers to implementing the programmes of the Reconstruction and Development Programme (RDP) and provides for points to be awarded for specific goals (refer to table 5, page 15).

## 16. EVALUATION AND SELECTION CRITERIA

### 16.1 MINIMUM STANDARDS

The Fund has set minimum standards (Phases) that a bidder needs to meet in order to be evaluated and selected as a successful bidder. The minimum standards consist of the following:

**Table 3**

| Phase 1                                                                                                                                                          | Phase 2                                                                                                                                                            | Phase 3                                                                                                              |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------|
| Primary review of mandatory and other bid requirements                                                                                                           | Technical Compliance                                                                                                                                               | Price and Specific Goals                                                                                             |
| Bidders must submit the documents as outlined in paragraph -16.2 (Table 4) below. Only bidders that comply with these requirements will be evaluated in Phase 2. | Bidder(s) are required to achieve a minimum of 70 points out of 100 points for the technical evaluation criteria to proceed to Phase 3 (Price and Specific Goals). | Bidder(s) will be evaluated in terms of paragraph 16.4 of this bid document for price and applicable specific goals. |

### 16.2 PHASE 1 – PRIMARY REVIEW OF MANDATORY AND OTHER BID DOCUMENTS

Without limiting the generality of the Fund's other critical requirements for this Bid, bidder(s) **must** submit the documents listed in **Table 4** below.

All documents must be completed and signed by the duly authorised representative of the prospective bidder(s). During this phase, bidder responses will be reviewed to establish compliance with the listed administration and mandatory bid requirements.

**Table 4**

Bidders must submit all documents and information as per the table below. In order to avoid disqualification, it is imperative that bidders **MUST** familiarise themselves with the notes at the bottom of the table.

| Documents that must be submitted                                                                    | Non-submission will result in disqualification |                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|-----------------------------------------------------------------------------------------------------|------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Invitation to Bid – SBD 1 (Annexure C)</b>                                                       | No                                             | Complete and sign the supplied pro forma document                                                                                                                                                                                                                                                                                                                                                                                                                |
| <ul style="list-style-type: none"> <li><b>SBD or 3.3 - Pricing Schedule (Annexure D)</b></li> </ul> | *Yes                                           | Bidders must Indicate the total tender price (inclusive of all applicable taxes) for the duration of the contract period on the SBD or 3.3 – Pricing Schedule                                                                                                                                                                                                                                                                                                    |
| <b>Declaration of Interest – SBD 4 (Annexure E)</b>                                                 | No                                             | Complete and sign the supplied pro forma document.                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Preference Point Claim Form – SBD 6.1 (Annexure F)</b>                                           | No                                             | Complete and sign the supplied pro forma document. Bidders must also indicate the specific goal points claimed under Table 1 of the SBD 6.1 form.                                                                                                                                                                                                                                                                                                                |
| <b>Registration on Central Supplier Database (CSD)</b>                                              | No                                             | <p>The bidders must be registered as service providers on the Central Supplier Database (CSD). Bidders who are not registered must proceed to complete the registration of your company prior to submitting your proposal.</p> <p>Visit <a href="https://secure.csd.gov.za/">https://secure.csd.gov.za/</a> to obtain your vendor number.</p> <p>The proof is the registration certificate received from the CSD indicating the unique vendor number issued.</p> |

| Documents that must be submitted                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Non-submission will result in disqualification |                                                                                                                                                                                                   |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Tax Compliance Status PIN                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | ***No                                          | Bidders must provide a tax compliance status PIN or the MAAA number obtainable when registering on the CSD in order for the Fund to verify the tax status of all bidders who submitted proposals. |
| <p><b><u>Important note:</u></b></p> <p><b><i>* SBD 3.3 - Pricing Schedule (Annexure D). The total price as per SBD 3.3 (Annexure D) will be considered by the Fund as the “price” for this tender and will be utilized in order to calculate points for Price and specific goals. Non-submission of a SBD 3.3 or a SBD 3.3 without a total bid price in the bid proposal, will lead <u>to immediate disqualification</u>.</i></b></p> <p><b><i>***Failure by a bidder to be tax compliant at the <u>award stage</u> or have written proof from SARS to verify their tax compliance status, or the arrangement the bidder has made with SARS to meet outstanding tax obligations, will lead to disqualification.</i></b></p> |                                                |                                                                                                                                                                                                   |
| <p><b><u>TECHNICAL MANDATORY DOCUMENT REQUIREMENTS ARE LISTED UNDER PART B – TECHNICAL SPECIFICATION AND SCOPE OF WORK OF THIS BID DOCUMENT AND NON-SUBMISSION OF THESE DOCUMENTS WILL LEAD TO IMMEDIATE DISQUALIFICATION.</u></b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                                |                                                                                                                                                                                                   |

### 16.3 PHASE 2 - TECHNICAL/FUNCTIONAL COMPLIANCE

All bidders are required to respond to the technical evaluation criteria scorecard (refer to **Annexure A and B** and primary criteria checklist (refer to Table 4).

Only Bidders that have met the Primary Criteria in **Phase 1** will be evaluated in **Phase 2** for functionality. Functionality will be evaluated in **Phase 2** as follows:

Bidders will be evaluated out of 100 points in respect of their expertise in the relevant field. Any bidder that scores less than 70 points out of 100 on functionality shall not be considered for **Phase 3** of the evaluation process.

***Refer to Annexure B for the detailed scoring guideline on the applicable evaluation criteria that will apply.***

#### 16.4 PHASE 3 - PRICE AND SPECIFIC GOAL EVALUATION (80/20 or 90/10)

Only Bidders that have met the 70-point threshold in **Phase 2** will be evaluated in **Phase 3** for Price and Specific Goals. Price and Specific Goals will be evaluated as outlined in the paragraphs below.

##### **Price: 80/90**

Bidders must ensure that a comprehensive and relatively competitive bid price inclusive of VAT and all other related costs are submitted in terms of the price/rates proposal. The quoted price must be for the full duration of the contract period.

Bidders **MUST also** complete the enclosed **SBD 3.3 – Pricing schedule (Annexure D)** that forms part of the tender pack provided to all bidders.

##### **Specific Goals: 20/10**

Bidders will score a minimum of 0 (zero) points and a maximum of 20 (twenty) points, depending on their Specific Goal score.

- The bid price (maximum 80/90 points)
- Specific Goal score (maximum 20/10 points)

#### **Stage 1 – Price Evaluation (80 or 90 Points)**

The following formula will be used to calculate the points for price:

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

Where:

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

However, if it becomes unclear during the course of the bidding process which preference point system will be applicable, then either the 80/20 or the 90/10 preference point system will apply, based on the lowest acceptable bid which will determine the applicable preference point system that will be used.

***Stage 2 – Specific Goal Evaluation (20 or 10 Points)***

***Specific Goal Points allocation***

A maximum of 20 or 10 points may be allocated to a bidder for attaining the required specific goals in accordance with the table below:

**Table 5**

| Specific goals                       | 20 points allocation based on 80/20 | 10 points allocation based on 90/10 | The specific goals applicable to this tender [Mark with "X" in the relevant block and ensure that the total adds up to 10 points] | Evidence/Proof requirements [Refer to paragraphs (a) to (d) below Table 5 for detailed descriptions] |
|--------------------------------------|-------------------------------------|-------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------|
| 1. Black ownership (100%)            | 10                                  | 5                                   | X                                                                                                                                 | (a) & (b)                                                                                            |
| 2. Women ownership (51-100%)         | 5                                   | 2                                   | X                                                                                                                                 | (b)                                                                                                  |
| 3. Youth ownership (51-100%)         | 3                                   | 2                                   | X                                                                                                                                 | (b)                                                                                                  |
| 4. Disability (51-100%)              | 2                                   | 1                                   | X                                                                                                                                 | (e)                                                                                                  |
| 5. EME/QSE black owned (51 - 100%)   | 5                                   | 3                                   |                                                                                                                                   | (a) & (b)                                                                                            |
| 6. Township and Rural Development    | 5                                   | 2                                   |                                                                                                                                   | (c)                                                                                                  |
| 7. EME/QSE women owned (51-100%)     | 5                                   | 3                                   |                                                                                                                                   | (b)                                                                                                  |
| 8. EME/QSE youth owned (51-100%)     | 5                                   | 3                                   |                                                                                                                                   | (b)                                                                                                  |
| 9. Military Veteran ownership (100%) | 5                                   | 3                                   |                                                                                                                                   | (e)                                                                                                  |
| 10. Co-operatives                    | 10                                  | 5                                   |                                                                                                                                   | (b)                                                                                                  |

Specific goal points will be allocated to bidders on submission of the following documentation or evidence:

- (a) An original or valid B-BBEE Certificate or a certified copy thereof issued by a verification agency accredited by SANAS or an affidavit if applicable whichever is applicable to the bidder. The certificate must clearly indicate the percentages of the specific goals claimed. Also refer to Table 6 below for more detail.
- (b) A current valid CIPC certificate together with copies of the IDs of the directors who hold ownership.
- (c) Municipal rates and taxes statements not older than three months with physical business address of the bidder, must be attached to the proposal. In the case of rented facilities where no rates and taxes statements are available in the name of the bidder, a copy of a valid lease agreement for the rented facility must be attached as evidence.
- (d) Bidders must note that physical site-inspections may be conducted to verify addresses provided.

- (e) A doctor's letter on a doctor's letterhead indicating the applicable International Disability Code 10 (IDC10).
- (f) Proof of status as Military Veteran – must be registered on the central database for military veterans of the Department of Military Veterans.

### **Joint Ventures and Consortiums**

A trust, consortium or joint venture, will qualify for points for their specific goal points, provided that the entity submits their B-BBEE status level certificate as a legal entity. The certificate must have been issued by a SANAS accredited verification agency.

A trust, consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity, if the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid. These B-BBEE certificates must have been issued by a SANAS accredited verification agency.

Non-compliance will lead to a zero score under the relevant specific goal.

### **Stage 3 (90 + 10 = 100 points) or (80+20=100 points)**

The Price and specific goal points will be consolidated.

## **16.5 FINANCIAL ANALYSIS**

A Financial Analysis will be conducted on the qualifying bidder(s) after the completion of Pricing and specific goal evaluation.

As a minimum requirement, the bidder must submit confirmation of its financial soundness to prove that it is a going concern. This could be done through one of the following options:

- (i) audited financial statements signed by the relevant parties; or
- (ii) proven statistics for the last financial year; or
- (iii) other form of documentary evidence to that effect; or
- (iv) through a letter signed by the CEO/ CFO indicating the financial statistics.

The information provided must cover the last full financial year **and** it must confirm in writing or must prove that the relevant party is a going concern.

In the case of an unincorporated Joint Venture (JV), the separate audited annual financial statements of the last full financial year of all the entities forming part of the JV should be submitted. A copy of the JV legal agreement detailing the percentage ownership of each entity should also be included in the submission. Incorporated JVs must submit financial statements in the name of the incorporated JV entity.

Note should be taken that the successful bidder(s) might be required to submit audited financial statements during the contract period should the Fund deem it necessary to mitigate any risks that may arise during this period.

## **17. GENERAL CONDITIONS OF CONTRACT**

Any award made to a bidder(s) under this bid is conditional, amongst others, upon:

- 17.1** The bidder(s) accepting the terms and conditions contained in the General Conditions of Contract (refer to **Annexure G**) as the minimum terms and conditions upon which the Fund is prepared to enter into a contract with the successful bidder(s); and
- 17.2** By submitting a proposal, a bidder accepts the conditions as contained in the General Conditions of Contract (**Annexure G**).

## **18. CONTRACT PRICE ADJUSTMENT/ANNUAL ESCALATION**

Annual escalations should be CPI related as published by Stats SA and other legislative taxes.

## **19. SERVICE LEVEL AGREEMENT / CONTRACT**

- 19.1** Upon award of the tender, the Fund and the successful bidder(s) will conclude a contract / service level agreement regulating the specific terms and conditions applicable to the goods and/or services being procured by the Fund.
- 19.2** The bid specifications of this bid will form an integral part of the contract / service level agreement tender document and therefore bidders must clearly indicate in their proposals whether the specific goods and/or services offered are according to specification or not.

## **20. SPECIAL CONDITIONS OF THIS BID**

The Fund reserves the right:

- 20.1** not to award or to cancel this tender (i) should there be no longer a need for the goods/services; (ii) funds are no longer available to cover the total envisaged expenditure; (iii) no acceptable bid is received; and (iv) there is a material irregularity in the tender process.
- 20.2** to negotiate a market-related price with a bidder in accordance with the provisions of the UIF's SCM Policy provisions.
- 20.3** to accept part of a tender rather than the whole tender;
- 20.4** to carry out site inspections, product evaluations or explanatory meetings in order to verify the nature and quality of the services offered by the bidder(s), whether before or after adjudication of the Bid;
- 20.5** to correct any mistakes at any stage of the tender that may have been in the Bid documents or occurred at any stage of the tender process;
- 20.6** to conduct Financial Analysis only on the recommended bidder(s) after completion of the pricing and specific goal evaluation stage. In this regard bidders are referred to paragraph 16.5 of this bid which outlines the financial documentation required from bidders.
- 20.7** not to award the tender to the bidder whose financial matters are not in order.
- 20.8** award to multiple bidders to spread the risk.

## **21. THE FUND REQUIRES BIDDER(S) TO DECLARE**

In the Bidder's Technical response, bidder(s) are required to declare the following:

Confirm that the bidder(s) is to –

- 21.1** act honestly, fairly, and with due skill, care and diligence, in the interests of the Fund;
- 21.2** have and employ effectively the resources, procedures and appropriate technological systems and equipment for the proper performance of the services;
- 21.3** act with circumspection and treat the Fund fairly in a situation of conflicting interests;
- 21.4** comply with all applicable statutory or common law requirements applicable to the conduct of business;

- 21.5 make adequate disclosures of relevant material information including disclosures of actual or potential own interests, in relation to dealings with the Fund;
- 21.6 avoidance of fraudulent and misleading advertising, canvassing and marketing;
- 21.7 conduct their business activities with transparency and consistently uphold the interests and needs of the Fund as a client before any other consideration; and
- 21.8 to ensure that any information acquired by the bidder(s) from the Fund will not be used or disclosed unless the written consent of the client has been obtained to do so.

## **22. CONFLICT OF INTEREST, CORRUPTION AND FRAUD**

The Fund reserves its right to disqualify any bidder who either itself or any of whose members (save for such members who hold a minority interest in the bidder through shares listed on any recognised stock exchange), indirect members (being any person or entity who indirectly holds at least a 15% interest in the bidder other than in the context of shares listed on a recognised stock exchange), directors or members of senior management, whether in respect of the Unemployment Insurance Fund or any other government organ or entity and whether from the Republic of South Africa or otherwise ("Government Entity") -

- 22.1 engages in any collusive tendering, anti-competitive conduct, or any other similar conduct, including but not limited to any collusion with any other bidder in respect of the subject matter of this bid;
- 22.2 seeks any assistance, other than assistance officially provided by a Government Entity, from any employee, advisor or other representative of a Government Entity in order to obtain any unlawful advantage in relation to procurement or services provided or to be provided to a Government Entity;
- 22.3 makes or offers any gift, gratuity, anything of value or other inducement, whether lawful or unlawful, to any of the Fund's officers, directors, employees, advisors or other representatives;
- 22.4 makes or offers any gift, gratuity, anything of any value or other inducement, to any Government Entity's officers, directors, employees, advisors or other representatives in order to obtain any unlawful advantage in relation to procurement or services provided or to be provided to a Government Entity;

- 22.5** accepts anything of value or an inducement that would or may provide financial gain, advantage or benefit in relation to procurement or services provided or to be provided to a Government Entity;
- 22.6** pays or agrees to pay to any person any fee, commission, percentage, brokerage fee, gift or any other consideration, that is contingent upon or results from, the award of any tender, contract, right or entitlement which is in any way related to procurement or the rendering of any services to a Government Entity;
- 22.7** has in the past engaged in any matter referred to above; or
- 22.8** has been found guilty in a court of law on charges of fraud and/or forgery, regardless of whether or not a prison term was imposed and despite such bidder, member or director's name not specifically appearing on the List of Tender Defaulters kept at National Treasury.

Furthermore, a tenderer may be considered to have a conflict of interest with one or more parties in this tendering process, if:

- (a) they have a controlling partner/majority shareholder in common; or
- (b) they have a relationship with each other, directly or through common third parties, that puts them in a position to have access to information about or influence on the tender/proposal of another tenderer, or influence the decisions of the UIF regarding this bidding process.

**A Tenderer must not have a conflict of interest. All Tenderers found to have a conflict of interest shall be disqualified.**

## **23. MISREPRESENTATION DURING THE LIFECYCLE OF THE CONTRACT**

- 23.1** The bidder should note that the terms of this bid will be incorporated in the proposed contract with the successful bidder by reference, and that the Fund relies upon the bidder's response to this bid as a material representation in making an award to a successful bidder and in concluding an agreement with the bidder.

**23.2** It follows therefore, that misrepresentations in a bid response / proposal may give rise to service termination and a claim by the Fund against the bidder notwithstanding the conclusion of the Service Level Agreement between the Fund and the bidder for the provision of the service in question. In the event of a conflict between the bidder's proposal and the Service Level Agreement concluded between the parties, the Service Level Agreement will prevail.

#### **24. PREPARATION COSTS**

The bidder will bear all its costs in preparing, submitting and presenting any response or proposal to this bid and all other costs incurred by the bidder throughout the bid process. Furthermore, no statement in this bid will be construed as placing the Fund, its employees or agents under any obligation whatsoever, including in respect of costs, expenses or losses incurred by the bidder in the preparation of their response to this bid.

#### **25. INDEMNITY**

If a bidder breaches the conditions of this bid and, as a result of that breach the Fund incurs costs or damages (including, without limitation, the cost of any investigations, procedural impairment, repetition of all or part of the bid process and/or enforcement of intellectual property rights or confidentiality obligations), then the bidder indemnifies and holds the Fund harmless from any and all such costs which the Fund may incur and for any damages or losses the Fund may suffer.

#### **26. PRECEDENCE**

This document will prevail over any information provided during any briefing session whether oral or written, unless such written information provided, expressly amends this bid document by reference.

#### **27. LIMITATION OF LIABILITY**

A bidder participates in this bid process entirely at its own risk and cost. The Fund shall not be liable to compensate a bidder on any grounds whatsoever for any costs

incurred or any damages suffered as a result of the bidder's participation in this bid process.

## **28. TAX COMPLIANCE**

No tender shall be awarded to a bidder who is not tax compliant. The Fund reserves the right to withdraw an award made, or cancel a contract concluded with the successful bidder in the event that it is established that such bidder was in fact not tax compliant at the time of the award, or whose verification against the Central Supplier Database (CSD) proves to be non-compliant. It remains the duty of a successful bidder to remain tax compliant for the full duration of the contract.

## **29. NATIONAL TREASURY - PROHIBITED BIDDERS**

No tender shall be awarded to a bidder whose name (or any of its members, directors, partners or trustees) appears on the Register of Tender Defaulters kept by National Treasury, or who have been placed on National Treasury's List of Restricted Suppliers. The Fund reserves the right to withdraw an award, or cancel a contract concluded with a bidder should it be established, at any time, that a bidder has been blacklisted with National Treasury by another government institution.

## **30. GOVERNING LAW**

South African law governs this bid and the bid response process. The bidder agrees to submit to the exclusive jurisdiction of the South African courts in any dispute of any kind that may arise out of or in connection with the subject matter of this bid, the bid itself and all processes associated with the bid.

## **31. RESPONSIBILITY FOR SUB-CONTRACTORS AND BIDDER'S PERSONNEL**

A bidder is responsible for ensuring that its personnel (including agents, officers, directors, employees, advisors and other representatives), its sub-contractors (if any) and personnel of its sub-contractors comply with all terms and conditions of this bid. In the event that the Fund allows a bidder to make use of sub-contractors, such sub-contractors will at all times remain the responsibility of the bidder and the Fund will not under any circumstances be liable for any losses or damages incurred by or caused

by such sub-contractors. However, the successful bidder may not change sub-contracting arrangements for the duration of the contract period without the explicit written approval of the Fund.

## **32. CONFIDENTIALITY**

Except as may be required by operation of law, by a court or by a regulatory authority having appropriate jurisdiction, no information contained in or relating to this bid or a bidder's tender(s) will be disclosed by any bidder or other person not officially involved with the Fund's examination and evaluation of a Tender.

No part of the bid may be distributed, reproduced, stored or transmitted, in any form or by any means, electronic, photocopying, recording or otherwise, in whole or in part except for the purpose of preparing a Tender. This bid and any other documents supplied by the Fund remain proprietary to the Fund and must be promptly returned to the Fund upon request together with all copies, electronic versions, excerpts or summaries thereof or work derived there from.

Throughout this bid process and thereafter, bidders must secure the Fund's written approval prior to the release of any information that pertains to (i) the potential work or activities to which this bid relates; or (ii) the process that follows this bid. Failure to adhere to this requirement may result in disqualification from the bid process and civil action.

No confidential information relating to the process of evaluating or adjudicating tenders or appointing a bidder will be disclosed to a bidder or any other person not officially involved with such process.

Service providers will be required to sign a Non-Disclosure agreement with UIF that will provide for protection of information, data, know-how etc.

Should personal information be required in order for the service provider to carry out work, the service provider will be required to sign the Operator's agreement.

### **33. THE FUNDS PROPRIETARY INFORMATION**

Bidders must on their bid cover letter make a declaration that they did not have access to any of the Fund's proprietary information or any other matter that may have unfairly placed that bidder in a preferential position in relation to any of the other bidders.

## PROPOSAL SUBMISSION CHECKLIST



| No | Description                                                                                                                                                                                                                          | To be returned by bidder at bid closure |
|----|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|
| 1. | Three seal proposals, One original and two copies prepared for submission on closing date (paragraph 12.4, page 8)                                                                                                                   | Yes                                     |
| 2. | Each page of the proposal numbered and initialed <u>as well as changes within pages initialed</u> (paragraphs 12.6, page 8)                                                                                                          | Yes                                     |
| 3. | Contents of the proposal document is according to Table 2 (paragraph 12.7, page 8 and 9)                                                                                                                                             | Yes                                     |
| 4. | Copies of ID's included for vetting (paragraph 14, page 9)                                                                                                                                                                           | Yes                                     |
| 5. | Financial information as listed in paragraph 16.5 (paragraph 16.5, page 16)                                                                                                                                                          | Yes                                     |
| 6. | a) Sworn affidavit or certified copy of B-BBEE rating certificate from a SANAS accredited rating agency (if applicable).<br>b) A current valid CIPC certificate together with copies of the IDs of the directors who hold ownership. | Yes                                     |
| 7. | SBD 3.3: The total tender price inclusive of VAT for the duration of the contract period MUST be completed and submitted as part of the proposal (see Annexures D for detailed pricing requirements)                                 | Yes                                     |

| No  | Description                                                                                                                                                                                                                | To be returned by bidder at bid closure |
|-----|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|
| 8.  | Other SBD documents listed in Table 4, pages 11<br>Completed and signed pro forma documents submitted for - SBD 1 ( <i>Annexure C</i> ), SBD 4 ( <i>Annexure E</i> ) and SBD 6.1, including Table 1 ( <i>Annexure F</i> ), | SBD 1, SBD 4 and SBD 6.1                |
| 9.  | TAX Compliance status PIN/Tax clearance certificate (Table 4, pages 12)                                                                                                                                                    | Yes                                     |
| 10. | Proof of registration on the Central Supplier Database (CSD) (Table 4, page 11).                                                                                                                                           | Yes                                     |
| 11. | Technical mandatory document requirements are listed under Part B – technical specification and scope of work of this bid document (if applicable). (page 27)                                                              | Yes                                     |



## PART B – TECHNICAL SPECIFICATION AND SCOPE OF WORK

### TECHNICAL MANDATORY REQUIREMENTS

- i. The Project Lead/Director for Project Management Office must be a registered and certified Project Management Professional and proof of registration/certification must be attached (certified copy).

**Non-submission of proof of registration/certification** (certified copy) at closing date **will result in disqualification.**

- ii. Attendance to the compulsory briefing session and completion of the attendance registers with the Companies details and contact person.

**Non-attendance of briefing session will result in disqualification.**

- iii **Annexure H MUST** be fully completed by the duly authorized representative of the company bidding for services at the UIF. Failure to complete this form fully is an **immediate disqualification.**

## 1. SCOPE OF WORK

### 1.1 Background

The Labour Activation Programmes (LAP) Chief Directorate is a critical component of the Unemployment Insurance Fund's (UIF) mandate to facilitate job creation and preservation and support economic growth in South Africa. However, LAP currently faces significant capacity constraints and governance concerns, hindering its ability to effectively manage and oversee the complex range of funded projects.

These limitations are becoming increasingly urgent as the Department of Employment and Labour seeks to massively scale job creation and preservation, targeting between 360,000 and 2 million new jobs between 2024 and 2027. To ensure the effective and accountable implementation of these ambitious targets, especially in underserved and remote areas, it's imperative for LAP to augment its capacity.

The outsourcing of critical project management and professional services to bolster several key areas within LAP, allowing for enhanced oversight, project management,



and financial accountability. This strategic move will enable LAP to better support the UIF's mission and meet the demands of job creation and preservation initiatives in line with the government's goals.

Labour Activation Programme requires the services of a panel of service providers to provide Project Management Services and Professional Services for a variety of its LAP projects. The project types include but are not limited to the types listed below and include oversight of all work typically required for the successful delivery of these various project:

The Labour Activation Programmes (LAP) is a comprehensive initiative designed to tackle unemployment and support business growth in South Africa. Funded by the Unemployment Insurance Fund (UIF), LAP offers a multi-pronged approach, focusing on the following three key objectives:

#### **1. Enhancing Employability:**

- **Direct Job Placement:** LAP connects unemployed UIF beneficiaries with job opportunities directly through partnerships. This provides immediate employment and income generation for individuals seeking work.
- **Skills Development and Training:** LAP recognizes that some individuals may require additional skills or training to be competitive in the job market. The programme supports training programmes to equip beneficiaries with the necessary skills to secure employment. Following training, LAP partners are required to place beneficiaries with suitable employers.

#### **2. Enabling Entrepreneurship:**

- **Entrepreneurial Training and Support:** LAP fosters a spirit of entrepreneurship through partnerships by providing training and support to individuals interested in starting their own businesses. This empowers them to become self-employed and contribute to the economy.
- **Small Business Establishment and Incubation:** The program assists budding entrepreneurs with the process of establishing small businesses through partnerships. This includes guidance on business planning, registration, and access to resources. Incubation support may also be provided to nurture new businesses and increase their chances of success.

### 3. Preserving Jobs:

- **Business Turnaround and Recovery (BT&R) Programme:** Recognizing the importance of existing businesses, LAP offers the BT&R program to companies facing productivity challenges. The UIF finances turnaround services aimed at helping businesses overcome difficulties and remain operational. This programme helps to save existing jobs and prevent further unemployment.
- **Temporary Employer-Employee Relief Scheme (TERS):** Understanding that temporary financial difficulties can threaten jobs, LAP supports the TERS programme. Through TERS, the UIF provides financial relief to employers facing economic hardship or employee distress. This temporary wage subsidy helps companies retain staff while they work towards recovery, preventing job losses during challenging periods.

By offering a combination of direct job placement, skills development, entrepreneurial support, and business rescue initiatives, the Labour Activation Programmes play a vital role in promoting employment opportunities, fostering business growth, and strengthening the South African economy.

Table 1 below provides a summary of panel description that LAP intend to establish

| PANEL/SERVICE PROVIDER          | PANEL 4DESCRIPTION                                    | TOPIC                                                         |
|---------------------------------|-------------------------------------------------------|---------------------------------------------------------------|
| PANEL A (Four to six companies) | Project Monitoring Services and professional services | Monitoring of programmes/projects<br>Project support services |
| PANEL B (one to two companies)  | Project Management Office                             | Oversight of all projects<br>Project support services         |

## 1.2 Project Monitoring Services

The appointed bidder will be tasked with the monitoring of LAP projects and will focus on tracking progress and ensuring the initiative meets its goals. Here are key project monitoring activities for this purpose:

### 1.2.1 Planning and Setup:

- 1.2.1.1 **Define Project Scope:** Clearly outline what the monitoring entails. This includes metrics to be tracked (e.g., number of jobs created, types of jobs, demographics of beneficiaries), data collection methods (e.g., surveys, employer reports), and reporting frequency.
- 1.2.1.2 **Develop Data Collection Tools:** Design surveys, templates, or dashboards to gather information from relevant stakeholders like employers, training programs, and job seekers.
- 1.2.1.3 **Establish Communication Plan:** Define how progress updates, reports, and any issues will be communicated to project stakeholders (government agency, program funders).

### 1.2.2 Monitoring and Tracking:

- 1.2.2.1 **Data Collection:** Implement the designed data collection methods to gather information on job creation and preservation progress according to the defined schedule.
- 1.2.2.2 **Data Analysis:** Analyse collected data to track progress towards job creation and preservation goals. Identify trends, patterns, and potential roadblocks.
- 1.2.2.3 **Performance Reporting:** Prepare regular reports summarising key metrics, progress achieved, and any challenges encountered. Present findings to stakeholders with clear visuals (charts, graphs).

### **1.2.3 Control and Corrective Actions:**

**1.2.3.1 Identify Deviations:** Analyse data to identify any deviations from project goals or unexpected trends.

**1.2.3.2 Risk Management:** Proactively identify potential risks that could hinder job creation and preservation (e.g., skills gaps, industry changes). Develop contingency plans to mitigate these risks.

**1.2.3.3 Recommendations and Adjustments:** Based on analysis, suggest corrective actions or adjustments to the job creation and preservation programmes as needed. This might involve changes to training programs, outreach strategies, or resource allocation.

### **1.2.4 Project Closure:**

**1.2.4.1 Final Report:** Prepare a comprehensive final report summarising the project's overall effectiveness in achieving job creation and preservation goals. Include key findings, challenges overcome, and recommendations for future projects.

**1.2.4.2 Lessons Learned:** Document valuable lessons learned throughout the project that can be applied to future job creation and preservation initiatives.

### **1.2.5 Data security, Stakeholder Management and Project Management tools:**

**1.2.5.1 Data Security:** Ensure all data collection and storage methods comply with relevant data privacy regulations.

**1.2.5.2 Stakeholder Management:** Maintain open communication with all project stakeholders, address concerns promptly, and keep them informed on progress and potential roadblocks.

**1.2.5.3 Project Management Tools:** Utilise appropriate project management tools to track tasks, deadlines, budgets, and communication.

### 1.3 Project Management Office

The bidder will be required to provide inter alia the following services:

- i. Increase efficiency and effectiveness by standardising processes and defining best practices within the LAP environment
- ii. Define, standardise, establish and runs business critical planning and operational processes within the LAP programme
- iii. Help Project Monitoring Teams move in the same direction
- iv. Develop the PMO Team
- v. Project status reporting
- vi. Provides administrative support and invests in templates, tools, software to better manage the projects.
- vii. Research, analyse, review, assist and advise on the development of effective LAP strategies regarding the programme and project effectiveness
- viii. Become a centre of excellence for project execution, develop, maintain and continuously improve a set of project and programme management systems, gate review and approval system, methodologies, procedures, standards, governance principles, practices and templates for managing projects in line with best practices and LAP requirements.
- ix. Supports the strategic objectives of the Fund and fulfils a key LAP programme management and/or oversight role in programme and project management and governance processes.
- x. Responsible for risk reviews, readiness reviews and quality assurance
- xi. Create a knowledge base with lessons learned, best practices and improvement steps from past projects to avoid repeating errors over and over.
- xii. Develop training materials and train and coach project leaders, sponsors and stakeholders. Select, implement and train employees on applicable project management methodologies, tools and software.

- xiii. Manage a resource capacity plan or resource forecast to help understand the resources required for projects and programmes.
- xiv. Administrative and operational support for projects manager and project teams in the areas of conflict management, risk management, integration management, safety, health and environmental management, quality management, workshop moderation, government relations and public affairs.
- xv. Improve project and programme management and transparent communication.
- xvi. May be required to be part of the UIF strategic planning team.
- xvii. Focus on critical initiatives.
- xviii. Foster talent and grow competencies.

#### **1.4 Professional services (Project support services)**

##### **1.4.1 Secretarial Services**

The bidder will be required to provide inter alia the following services:

- i. Provide record of all proceedings
- ii. Research and develop discussion documents based on the topic discussions of conference, workshops and meetings.
- iii. Assist in developing presentations and presenting during conferences, workshops and meetings.
- iv. Provide post conference, workshops and meetings services in terms of reports detailing proceedings, resolutions taken during sessions
- v. Provide proof reading, editing, design and layout
- vi. Development of implementation plan that will be implemented by LAP that will assist with future engagements with other role players
- vii. Provide a project plan detailing how conference, workshops and meetings are going to take place from the beginning to the end of the sessions.
- viii. Conference, workshop and meetings preparation and support during sessions

## **Skills required**

- Presentation and facilitation skills
- Report writing and editing
- Editorial
- Research

### **1.4.2 Legal services**

The bidder will be required to provide inter alia the following services:

- Provide legal services to the Fund, representing the Fund in litigation matters, provide legal opinions and advise on litigation matters. The panel will provide general legal support on a wide range of legal matters pertaining to inter alia, the following:
- Drafting and vetting of contract
- Legislative drafting
- Public law
- Corporate governance
- Data privacy law
- Any other matter having an impact on the Fund's ability to execute its mandate

### **1.4.3 Contract Management services**

The bidder will be required to provide inter alia the following services:

- Provide contract management services pertaining to inter alia, the following:
- Contract creation
- Contract negotiation
- Contract execution
- Contract compliance monitoring and management
- Contract renewal and close out

### **1.4.4 Monitoring and Evaluation (M&E)**

The bidder will be required to provide inter alia the following services:

- i. Conduct various types of evaluation to adequately inform planning, decision making and budgeting<so as to improve the relevance, effectiveness, efficiency, impact and sustainability of LAP interventions
- ii. Design and implement M&E systems to track project progress and measure impact.

#### **1.4.5 Finance and accounting services**

The bidder will be required to provide inter alia the following services:

Thoroughly verify work completed in line with project milestones, ensuring accountability before payment approvals by

- 1.4.5.1      Reviewing project budget and financial reports:** Analyse project budgets to understand funding allocation and track spending against those allocations.
- 1.4.5.2      Tracking and recording project expenditures:** Meticulously record all project expenses, ensuring proper categorisation and allocation to relevant cost expense types for accounting and disclosure purposes.
- 1.4.5.3      Verifying expenditure reports against project deliverables:** Reconcile all expenditure to cost items approved for the projects in line with the funding agreements.
- 1.4.5.4      Reconciling bank statements for project funds:** Regularly reconcile bank statements for project accounts to ensure accuracy and identify any discrepancies.
- 1.4.5.5      Managing accounts payable and receivable related to the project:** Track payments owed to partners to ensure that they are paid timeously. Manage the collection of payments from any partner reimbursing the project for costs.
- 1.4.5.6      Preparing financial reports:** Generate financial reports summarising project expenditures, budget variances, and overall financial performance. These reports are crucial for keeping Management and governance structures informed and ensuring transparency.

- 1.4.5.7 Ensuring compliance with financial regulations and funding requirements:** Job creation and preservation projects are funded through public funds. The appointed bidder must ensure all financial activities comply with relevant regulations and funding requirements to avoid noncompliance which may lead to delays, litigation or even cancellation of agreements.
- 1.4.5.8 Collaborating with project managers on budgeting and financial forecasting:** Work with project managers to develop realistic budgets projections and revise them as needed. Provide financial forecasting based on project activities and resource allocation.
- 1.4.5.9 Auditing project finances to ensure proper use of funds:** Assist with internal or external audits to verify proper financial management and identify any misuse of funds.
- 1.4.5.10 Preparing financial month-end and year-end processes:** Reconcile all monthly financial transactions accurately and report them in line with the entity's accounting requirements.
- 1.4.5.11 Facilitate budget availability and payments by**
- Allocation of budget to specific projects and confirmation of availability of budget on implementation of funding agreements and
  - for processing of invoices
  - Monitoring of budget and shifting of funds
  - Monthly reporting of budget versus actuals on each project
  - Daily tracking of invoices to achieve APP targets
  - Reconciliation of work invoiced against funding agreement
  - deliverables and progress reports
  - Obtaining approvals in terms of financial delegations of the Department

## **1.5 Resource requirements**

The Project Management teams are expected to perform the project monitoring procedures, compile relevant working papers and portfolio of evidence and the

finalisation of a project status report per project. An average Project Management team will comprise of at least:

### PROJECT MONITORING SERVICES TEAM A- PROJECT TEAM

| Resource                                          | Required Number | Roles and Responsibilities                                                                                                                                                                                                                              | Qualification and Experience                                                                                 |
|---------------------------------------------------|-----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|
| Project Lead/Director                             | 1               | <ul style="list-style-type: none"> <li>Responsible for all outputs of work performed by firm.</li> </ul>                                                                                                                                                | CA, BTech in Project Management CFE or CIA with at least 10 years relevant experience                        |
| Project Monitoring Manager                        | 1               | <ul style="list-style-type: none"> <li>Engaging with funded organizations</li> <li>Managing timelines and outputs</li> <li>Ensuring working papers are adequate and aligned to report inputs</li> <li>Performing a quality review of reports</li> </ul> | Relevant Post-graduate Qualification with minimum 4 years' experience (CA, CFE or CIA added advantage) -     |
| Project Monitoring Team Leader                    | 2               | <ul style="list-style-type: none"> <li>Managing team logistics</li> <li>Drafting of reports in conjunction with Project Monitoring team</li> <li>Thorough review of working papers</li> </ul>                                                           | Degree/B Tech in accounting or auditing with at least 3 years relevant experience.                           |
| Project Monitoring Team Members (M & E Resources) | 4               | <p>Perform project monitoring work aligned to agreed-upon procedures</p> <p>All team members are responsible for:</p> <ul style="list-style-type: none"> <li>Compilation of adequate</li> </ul>                                                         | BCom degree or Diploma in accounting and/or auditing with at least 2 years' experience for each team member. |

|  |  |                                                                                                                               |  |
|--|--|-------------------------------------------------------------------------------------------------------------------------------|--|
|  |  | relevant working papers<br>• Compiling a portfolio of evidence<br>• Assist in preparation of the draft project status report. |  |
|--|--|-------------------------------------------------------------------------------------------------------------------------------|--|

In order to demonstrate their capacity, bidders are to indicate how many project monitoring teams they can mobilise for the duration of the engagement.

### Support Team:

Bidders must include the following resources that will perform an oversight, coordination and/or support function to their project monitoring team(s):

### PROJECT MONITORING SERVICES TEAM B- SUPPORT TEAM

| Resource                           | Required Number | Roles and Responsibilities                                                                                                                                                               | Qualification and Experience                                                                                               |
|------------------------------------|-----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------|
| Secretarial resources              | 3               | • 1 Resources- Admin checking<br>• 1 Resources- Drafting submissions<br>• 1 Resources- Taking minutes                                                                                    | • 1 Resources- Degree /Diplomain admin<br>• 1 Resources- Degree/Diploma in admin<br>• 1 Resources- Degree/Diploma in Admin |
| Financial and accounting resources | 2               | • 1 Resources- Ensuring that there is alignment between project deliverables and expenditure incurred for each project (certification of invoices)<br>• 1- issuing LAP financial reports | • 2 Resources- Degree (Bcompt/ BCom (Accounting))                                                                          |

Bidders' are encouraged to strategically collaborate, in the form of sub-contracting and/or joint ventures, to ensure that they include all categories of resources competencies in their submissions.

### **Project Management Office Team:**

Bidder must include the following resources that will perform an oversight, coordination and/or support function to their project management team(s):

#### **PMO TEAM**

| <b>Resource</b>                                                                                                                      | <b>Required Number</b> | <b>Roles and Responsibilities</b>                                                                                                                                                                                                                          | <b>Qualification and Experience</b>                                                                |
|--------------------------------------------------------------------------------------------------------------------------------------|------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|
| Project Lead/Director                                                                                                                | 1                      | <ul style="list-style-type: none"><li>• Responsible for all outputs of work performed by firm.</li></ul>                                                                                                                                                   | CA, BTech in Project Management CFE or CIA with at least 10 years relevant experience              |
| Project Managers (Strategic planning, project governance, resource management, project management training and Financial Management) | 4                      | <ul style="list-style-type: none"><li>• Overall responsible for management of teams during execution of projects.</li><li>• Submit reports as and when requested by the UIF;</li><li>• Attend and report at project steering committee meetings.</li></ul> | Three year tertiary qualification with at least 5 years relevant experience in project management. |

#### **PMO SUPPORT TEAM**

| <b>Resource</b>       | <b>Required Number</b> | <b>Roles and Responsibilities</b>                                                                                         | <b>Qualification and Experience</b>                                                    |
|-----------------------|------------------------|---------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------|
| Secretarial resources | 6                      | <ul style="list-style-type: none"><li>• 2 Resources- Admin checking</li><li>• 2 Resources- Drafting submissions</li></ul> | <ul style="list-style-type: none"><li>• 6 Resources- Degree/Diploma in admin</li></ul> |

|                                    |   |                                                                                                                                                                                                                                                                     |                                                                                                                                          |
|------------------------------------|---|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------|
|                                    |   | <ul style="list-style-type: none"> <li>• 2 Resources- Taking minutes</li> </ul>                                                                                                                                                                                     |                                                                                                                                          |
| Legal resources                    | 6 | <ul style="list-style-type: none"> <li>• 3 Resources- drafting agreements</li> <li>• 3 Resources- Managing contracts</li> </ul>                                                                                                                                     | <ul style="list-style-type: none"> <li>• 3 Resources- LLB</li> <li>• 3 Resources- Degree in Law/commercial Law</li> </ul>                |
| M& E resources                     | 4 | <ul style="list-style-type: none"> <li>• Resources- Project Monitoring</li> </ul>                                                                                                                                                                                   | <ul style="list-style-type: none"> <li>• 4 Resources- Degree Public Admin</li> </ul>                                                     |
| Financial and accounting resources | 8 | <ul style="list-style-type: none"> <li>• 2 Resources- Manage budget and expenditure</li> <li>• 2- issuing LAP financial reports</li> <li>• 1 Resource – Budget monitoring</li> <li>• 3 Resources – Co- ordination of payments and expenditure monitoring</li> </ul> | <ul style="list-style-type: none"> <li>• 6 Resources- Degree BCom(Acc)/(Bcompt)</li> <li>• 2 Resources- Chartered Accountants</li> </ul> |

## ALLOCATION OF WORK

The work allocation will be equally distributed in terms of beneficiary quantities and the estimated number of hours it will take to complete the activities. Further allocation of work will be performance based.

The table below the distribution of projects across all provinces of South Africa,

| No. | Province      | Number of projects | %    |
|-----|---------------|--------------------|------|
| 1   | Eastern Cape  | 33                 | 10%  |
| 2   | Free State    | 13                 | 4%   |
| 3   | Gauteng       | 105                | 31%  |
| 4   | KwaZulu-Natal | 49                 | 15%  |
| 5   | Limpopo       | 12                 | 3%   |
| 6   | Mpumalanga    | <b>18</b>          | 5%   |
| 7   | National      | 57                 | 17%  |
| 8   | North West    | 19                 | 6%   |
| 9   | Northern Cape | 6                  | 2%   |
| 10  | Western Cape  | 23                 | 7%   |
|     | 10            | 335                | 100% |

## ANNEXURE A – EVALUATION CRITERIA ON FUNCTIONALITY

| FUNCTIONALITY                                                     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | 100 Points |
|-------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| Qualifying proposals will be evaluated in terms of the following: |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |            |
| 1.                                                                | <p><b>1.1 The Bidder must provide the Project Plan with activities in the following areas outlining how the project monitoring work will be organised, executed and evaluated. (10)</b></p> <ul style="list-style-type: none"> <li>• Direct Job Placement.</li> <li>• Skills Development and training</li> <li>• Entrepreneurial Training and support</li> <li>• Small business Establishment and Incubation.</li> <li>• Business turnaround and recovery Programme</li> <li>• Temporary Employer Employee Relief Scheme.</li> </ul>                                                                                                                                                                                                                                                                                                         | 15         |
|                                                                   | <p><b>1.2 The Bidder must provide the Detailed Plan to demonstrate how they will implement knowledge transfer to UIF LAP personnel during the execution of the contract. (5)</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |            |
| 2.                                                                | <p><b><u>2.1 Operational Experience (5)</u></b></p> <p>The Bidder must provide operational experience of the company in Project Monitoring Services as evidence by the company profile, the FUND reserves the right to perform due diligence to verify the information provided.</p> <p><b><u>2.2. Track Record: (10)</u></b></p> <ul style="list-style-type: none"> <li>• The Bidders must attach reference letters indicating the value of the project and also indicating the positive performance in Project Monitoring Services rendered by the company to its clients.</li> <li>• The UIF reserves the right to conduct reference check to the clients that the bidder provided the service.</li> <li>• References must indicate a positive outcome, must be on the letter head of the company, stating the duration of the</li> </ul> | 15         |

|                                                                                                                                                                                                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                  |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|
|                                                                                                                                                                                                                        | <b>contract, signed by authorized official and have a contact person including contact numbers</b>                                                                                                                                                                                                                                                                                                                                                      |                  |
| <b>3.</b>                                                                                                                                                                                                              | <b><u>Operational Managerial experience</u></b><br><br><b>The Bidder must provide curriculum vitae for Project Lead/Director to demonstrate the operational managerial experience in the similar project.</b>                                                                                                                                                                                                                                           | <b>10</b>        |
|                                                                                                                                                                                                                        | <b>Total</b>                                                                                                                                                                                                                                                                                                                                                                                                                                            | <b>40 points</b> |
| <i>Only bidders scoring 25 points and above under this Phase of functionality criteria will be eligible to be evaluated under the second Phase which entail requirements pertaining to different panels/categories</i> |                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                  |
|                                                                                                                                                                                                                        | <b>PANEL/CATEGORY A</b>                                                                                                                                                                                                                                                                                                                                                                                                                                 |                  |
| <b>4</b>                                                                                                                                                                                                               | <b>Monitoring of project in a multidisciplinary environment</b><br>Project: above R20 000 000– 10 points<br>Project: R10 000 001 - R20 000 000 – 07 points<br>Project: up to R10 000 000 – 03 points                                                                                                                                                                                                                                                    | <b>10</b>        |
| <b>5</b>                                                                                                                                                                                                               | <b>Qualification of project monitoring and support teams</b><br>Secretarial resources' qualifications – 2<br>Project team members' qualifications – 4<br>Project team leaders' qualifications – 2<br>Project managers' qualifications – 2                                                                                                                                                                                                               | <b>10</b>        |
| <b>6</b>                                                                                                                                                                                                               | <b>Experience of the project monitoring and support teams</b><br>Secretariat resource experience of 5 years or more – 4<br>Project team members experience of 5 years or more – 8<br>Project team leader experience of 5 years or more – 4<br>Project managers: 8 years or more – 4                                                                                                                                                                     | <b>20</b>        |
| <b>7</b>                                                                                                                                                                                                               | <b>Monitoring and Support Team</b><br><br>The bidder to provide CV's reflecting relevant experience and Qualifications of resources who will perform the monitoring and support function. This team must comprise of the following resources: <ul style="list-style-type: none"> <li>• Project Monitoring Manager;</li> <li>• Project Monitoring Team Leaders;</li> <li>• Project Monitoring Team Members;</li> <li>• Secretarial resources;</li> </ul> | <b>20</b>        |

|          |                                                                                                                                                                                                                                                                                                                            |                  |
|----------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|
|          | <ul style="list-style-type: none"> <li>Financial and accounting resources</li> </ul> <p>The Team Composition table (<b>Annexure I1</b>) must be completed, indicating all proposed resources. In cases where more than 1 monitoring and support team is proposed. Information to be included for each additional team.</p> |                  |
|          | <b>Total</b>                                                                                                                                                                                                                                                                                                               | <b>60 points</b> |
|          | <b>PANEL/CATEGORY B</b>                                                                                                                                                                                                                                                                                                    |                  |
| <b>4</b> | <b><u>Site visits and presentation</u></b><br><b>Bidders proposed system presentation detailing systems response to current LAP requirements (10).</b><br><b>Site visit – demonstration of ability to meet POPIA and resource requirements (10)</b>                                                                        | <b>20</b>        |
| <b>5</b> | <b>Certification/Accreditation</b><br>Project Management certification                                                                                                                                                                                                                                                     | <b>10</b>        |
| <b>6</b> | <b>Qualification of the Project Lead and support team</b><br>Secretarial resource qualification - 2<br>Legal resources qualification - 3<br>Project Managers qualifications – 4<br>Project Lead - Chartered Accountancy qualification or degree/B Tech in Project Management - 6                                           | <b>15</b>        |
| <b>7</b> | <b>Experience of the Project Lead and support team</b><br>Secretarial resource qualification - 2<br>Legal resources qualification - 3<br>Project Manager's experience of 10 years or more – 4<br>Project Lead/Director's experience of 10 years or more – 6                                                                | <b>15</b>        |
|          | <b>Total</b>                                                                                                                                                                                                                                                                                                               | <b>60 points</b> |

## ANNEXURE B – SCORING GUIDELINE FOR FUNCTIONALITY

### SCORING GUIDELINE

|    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |   |    |    |
|----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|----|----|
| 1. | <b>1.1 The Bidder must provide the Project Plan with activities in the following areas outlining how the project monitoring work will be organized, executed and evaluated:</b> <ul style="list-style-type: none"> <li>• Direct Job Placement</li> <li>• Skills Development and training</li> <li>• Entrepreneurial Training and support</li> <li>• Small business Establishment and Incubation.</li> <li>• Business turnaround and recovery Programme</li> <li>• Temporary Employer Employee Relief Scheme</li> </ul> | 0 | 05 | 10 |
|----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|----|----|

0 No project plan attached

OR

- 0 *Project plan attached with activities on how each activity will be executed but it is not indicated how these activities will be organised.*
- 5 Project plan attached with activities on how each activity will be organised and. Each activity covered (as listed above) clearly indicating how it will be **organised**, counts (1) point. Maximum of 5 points.
- 10 Project plan attached with activities on how each activity will be organised, executed and evaluated. Each activity, clearly indicating how it will be **organised, executed and evaluated**. Maximum of 10 points.

|     |                                                                                                                                                                       |   |   |
|-----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|---|
| 1.2 | <b>The Bidder must provide the Detailed Plan to demonstrate how they will implement knowledge transfer to UIF LAP personnel during the execution of the contract.</b> | 0 | 5 |
|-----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|---|

0 No detailed plan attached

OR

0 *Detailed plan attached with activities on how each activity will be executed but it is not indicated how these activities will be implemented.*

5 Detailed plan attached with activities on how each activity will be executed and indicate how these activities will be implemented.

|    |                                                                                                                                                                                                                                                                                                                                                                                                       |   |    |    |    |
|----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|----|----|----|
| 2. | <b><u>2.1 Operational Experience</u></b><br><b>The Bidder must provide operational experience of the company in project monitoring as evidenced by the company profile, the FUND reserves the right to perform due diligence to verify the information provided. Submission of company profile without required information or the non-submission of a company profile will lead to a zero score.</b> | 0 | 02 | 03 | 05 |
|----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|----|----|----|

0 0-less than 3 years' experience in the Project Monitoring field.

02 3-less than 6 years' experience in Project Monitoring field

03 6-less than 9 years' experience in Project Monitoring field

05 9 and more years' experience in Project Monitoring field

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |          |           |           |           |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|-----------|-----------|-----------|
| <b>2.2 Track Record:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <b>0</b> | <b>05</b> | <b>07</b> | <b>10</b> |
| <ul style="list-style-type: none"> <li>• The Bidders must attach reference letters indicating the value of the project and also indicating the positive performance in Project Monitoring services rendered by the company to its clients.</li> <li>• The UIF reserves the right to conduct reference checks with the client(s) that the bidder provided the service to.</li> <li>• References must indicate a positive outcome, must be on the letter head of the company, stating the duration of the contract, signed by authorized official and have a contact person including contact numbers</li> </ul> |          |           |           |           |

- 0 No relevant reference letter attached or does not fully meet the mentioned stated requirements.
- 05 1-2 relevant reference letters attached
- 07 3-4 relevant reference letters attached
- 10 5 and more relevant reference letters attached.

|           |                                                                                                                                                                                                                                                            |          |           |           |           |
|-----------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|-----------|-----------|-----------|
| <b>3.</b> | <b><u>Operational Managerial experience</u></b><br>The Bidder must provide curriculum vitae for Project Lead/Director demonstration operational managerial experience in rendering Project Monitoring services. CV not attached will amount to zero point. | <b>0</b> | <b>05</b> | <b>07</b> | <b>10</b> |
|           |                                                                                                                                                                                                                                                            |          |           |           |           |

- 0 0-less than 3 years' relevant experience in the rendering Project Monitoring services.
- 05 3-less than 6 years' relevant experience in rendering Project Monitoring services
- 07 6-less than 8 years' relevant experience in rendering Project Monitoring services
- 10 8 and more years' relevant experience in rendering Project Monitoring services

## PANEL/ CATEGORY A

|   |                                                                                                                                                            |   |    |    |    |
|---|------------------------------------------------------------------------------------------------------------------------------------------------------------|---|----|----|----|
| 4 | Monitoring of project in a multidisciplinary environment<br>Bidders to submit reference letters/documentation showing the value of the project implemented | 0 | 05 | 07 | 10 |
|---|------------------------------------------------------------------------------------------------------------------------------------------------------------|---|----|----|----|

- 0 No information provided
- 05 Projects up to R10 000 000
- 07 Projects between R10 000 001 and R20 000 000
- 10 Projects above R20 000 000

|   |                                                                                                                                                                                                                                                                                                                                               |   |    |    |    |
|---|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|----|----|----|
| 5 | Qualification of project monitoring and support teams<br>The Bidder fails to provide the team composition table I1 or No information provided (0)<br>Secretarial resources' qualifications (2)<br>Project team members' qualifications (4)<br>Project team leaders' qualifications – (2)<br>Project Monitoring Manager's qualifications – (2) | 0 | 02 | 08 | 10 |
|---|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|----|----|----|

- 0 The Bidder fails to provide the team composition table I1. No information provided
- 02 Secretarial resources' qualifications' provided and attached
- 08 Project team leaders', project team members' and secretarial resources' qualifications provided and attached.
- 10 Project Monitoring Manager' s, Project team leaders', project team members' and secretarial resources' qualifications provided and attached

***In instances where a CV and proof of qualification are not provided for one or more of the proposed team members, a team will not be counted as being complete.***

|   |                                                                                                                                                                                                                                                                                                                                                                                                                             |   |    |    |    |
|---|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|----|----|----|
| 6 | <b>Experience of the project monitoring and support teams</b><br><b>The Bidder fails to provide the team composition table I1 or No information provided or experience less than 5 years (0)</b><br><b>Secretarial resources - 5 years or more (4)</b><br><b>Project team members -5 years or more (8)</b><br><b>Project team leaders –5 years or more (4)</b><br><b>Project Monitoring Manager – 8 years or more – (4)</b> | 0 | 04 | 16 | 20 |
|---|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|----|----|----|

- 0 The Bidder fails to provide the team composition table I1  
No information provided or experience less than 5 years
- 04 Secretarial resources' experience of 5 years or more
- 16 Project team leader's, project team members and Secretarial resources' experience of 5 years or more
- 20 Project Monitoring Manager's, experience of 8 years or more, project team leader's, project team members and Secretarial resources' experience of 5 years or more

***In instances where a CV is not provided for one or more of the proposed team members, a team will not be counted as being complete.***

|    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |   |   |    |    |
|----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|---|----|----|
| 7. | <b>Monitoring and Support Team</b><br><br>The bidder to provide CV's reflecting relevant experience and Qualifications of resources who will perform the monitoring and support function. This team must comprise of the following resources: <ul style="list-style-type: none"> <li>• Project Monitoring Manager;</li> <li>• Project Monitoring Team Leaders;</li> <li>• Project Monitoring Team Members;</li> <li>• Secretarial resources;</li> <li>• Financial and accounting resources</li> </ul> The Team Composition table ( <b>Annexure I1</b> ) must be completed, indicating all proposed resources. In cases | 0 | 5 | 10 | 20 |
|----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|---|----|----|

|  |                                                                                                                                                                                                                                                                                                               |  |  |  |  |
|--|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|--|--|
|  | <p>where more than 1 monitoring and support team is proposed. Information to be included for each additional team.</p> <p><b><i>In instances where a CV and/or proof of qualification is not provided for one or more of the proposed team members, a team will not be counted as being complete.</i></b></p> |  |  |  |  |
|--|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|--|--|

- 0 The bidder fails to provide CV's and qualifications of all proposed resources or fails to provide the team composition table.
- 5 The bidder has provided all CV's and qualifications of the required resources and the bidder has completed all fields of the Team Composition Table. The bidder proposed one monitoring team and one support team.
- 10 The bidder has provided all CV's and qualifications of the required resources and the bidder has completed all fields of the Team Composition Table. The bidder proposed five monitoring teams and five support teams.
- 20 The bidder has provided all CV's and qualifications of the required resources and the bidder has completed all fields of the Team Composition Table. The bidder proposed more than five monitoring teams and more than five support teams.

#### **PANEL/ CATEGORY B**

|           |                                                                                                                                                                                                                                                                    |          |           |           |
|-----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|-----------|-----------|
| <b>4.</b> | <p><b><u>Site visits and presentation</u></b></p> <p><b>Bidders proposed system presentation detailing systems response to current LAP requirements (10).</b></p> <p><b>Site visit – demonstration of ability to meet POPIA and resource requirements (10)</b></p> | <b>0</b> | <b>10</b> | <b>20</b> |
|-----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|-----------|-----------|

- 0 Presentation session not attended or no presentation made or presentation does not detail the systems response to current LAP requirements.

AND

- 0 The bidder does not demonstrate the ability to meet the POPIA and resource requirements
- 10 Presentation made and provides details of systems response to current LAP requirements and bidder is partially able to demonstrate during site visits the ability to meet the POPIA and resource requirements.



- 20 Presentation made and provides details of systems response to current LAP requirements and the bidder is able to demonstrate during site visits the ability to meet the POPIA and resource requirements

|          |                                                                                                                                                                                                                     |  |  |          |           |
|----------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|----------|-----------|
| <b>5</b> | <b>Certification/Accreditation</b><br><b>Project Management certification of the Project Lead/Director.</b><br><b>The bidder must provide certified copy of the original Project Management valid certification</b> |  |  | <b>0</b> | <b>10</b> |
|----------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|----------|-----------|

- 0 No information provided or the bidder does not have the required certification
- 10 Certified copy of project management certification attached

|          |                                                                                                                                                                                                                                                                                                                                                                                           |          |           |           |           |           |
|----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|-----------|-----------|-----------|-----------|
| <b>6</b> | <b>Qualification of the Project Lead and support team</b><br><b>The Bidder fails to provide the team composition table I2 (0)</b><br><b>Secretarial resources' qualifications – 2</b><br><b>Legal resources' qualifications - 3</b><br><b>Project managers' qualifications – 4</b><br><b>Project Lead -Chartered Accountancy qualification or degree/B Tech in Project Management - 6</b> | <b>0</b> | <b>02</b> | <b>05</b> | <b>09</b> | <b>15</b> |
|----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|-----------|-----------|-----------|-----------|

- 0 The Bidder fails to provide the team composition table I2. No information provided or the Project Lead and support team do not have the required qualifications
- 02 Secretarial resources' qualifications provided and attached
- 05 Legal resources and secretarial resources' qualifications provided and attached
- 09 Project managers', legal resources and secretarial resources' qualifications provided and attached
- 15 Project Lead's, project managers', legal resources' and secretarial resources' qualifications provided and attached

***In instances where a CV and proof of qualification is not provided and attached for one or more of the proposed team members, a team will not be counted as being complete.***

|   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |   |    |    |    |    |
|---|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|----|----|----|----|
| 7 | <b>Experience of the Project Lead, Project Managers and support team</b><br><b>The Bidder fails to provide the team composition table I2. No information provided or the Project Lead and support team have less than 10 years' experience (0)</b><br><b>Secretarial resources – 10 years or more of experience (2)</b><br><b>Legal resources – 10 years or more of experience (3)</b><br><b>Project managers - 10 or more years of experience (4)</b><br><b>Project Lead/Director – 10 or more years of experience (6)</b> | 0 | 02 | 05 | 09 | 15 |
|---|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|----|----|----|----|

- 0 The Bidder fails to provide the team composition table I2. No information provided or the Project Lead and support team have less than 10 years' experience
- 02 Secretarial resources' experience of 10 years or more provided and CVs attached
- 05 Legal resources and secretarial resources' experience of 10 years or more provided and CVs attached
- 09 Project managers', legal resources and secretarial resources' experience of 10 years or more
- 15 Project Lead's, project manager's, legal resources' and secretarial resources' experience of 10 years or more provided and CV attached

***In instances where a CV is not provided and attached for one or more of the proposed team members, a team will not be counted as being complete.***

## **LIST OF ANNEXURES ATTACHED TO BID**

### **PART B**

- Annexure A:** Evaluation criteria on functionality
- Annexure B:** Scoring guideline for functionality

### **PART C**

- Annexure C:** SBD 1 - Invitation to Bid
- Annexure D:** SBD 3.3 – Pricing Scheme for Professional Services including detailed pricing schedule
- Annexure E:** SBD 4 – Bidder's disclosure
- Annexure F:** SBD 6.1 – Preferential points
- Annexure G:** General Conditions of contract
- Annexure H:** Indemnity Form
- Annexure I1** Team Composition Table – Project Monitoring Team
- Annexure I2** Team Composition Table – Project Management Office

PART A  
INVITATION TO BID

|                                                                                           |                                                                                                                                                                                                                                                                     |               |                                         |                     |
|-------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|-----------------------------------------|---------------------|
| YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY) |                                                                                                                                                                                                                                                                     |               |                                         |                     |
| BID NUMBER:                                                                               |                                                                                                                                                                                                                                                                     | CLOSING DATE: |                                         | CLOSING TIME: 11h00 |
| DESCRIPTION                                                                               | REQUEST FOR PROPOSAL FOR THE APPOINTMENT OF PANEL OF SERVICE PROVIDERS TO PROVIDE PROJECT MONITORING SERVICES AND PROJECT MANAGEMENT OFFICE SERVICES TO THE LABOUR ACTIVATION PROGRAMME IN THE UNEMPLOYMENT INSURANCE FUND FOR THE PERIOD OF THIRTY-SIX (36) MONTHS |               |                                         |                     |
| BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)       |                                                                                                                                                                                                                                                                     |               |                                         |                     |
| Unemployment Insurance Fund                                                               |                                                                                                                                                                                                                                                                     |               |                                         |                     |
| ABSA TOWERS, Ground Floor                                                                 |                                                                                                                                                                                                                                                                     |               |                                         |                     |
| 230 Lillian Ngonyi Street                                                                 |                                                                                                                                                                                                                                                                     |               |                                         |                     |
| Pretoria 0002                                                                             |                                                                                                                                                                                                                                                                     |               |                                         |                     |
| BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO                                            |                                                                                                                                                                                                                                                                     |               | TECHNICAL ENQUIRIES MAY BE DIRECTED TO: |                     |
| CONTACT PERSON                                                                            | W. Kruger                                                                                                                                                                                                                                                           |               | CONTACT PERSON                          |                     |
| TELEPHONE NUMBER                                                                          | 012 337 1876                                                                                                                                                                                                                                                        |               | TELEPHONE NUMBER                        |                     |
| FACSIMILE NUMBER                                                                          | N/A                                                                                                                                                                                                                                                                 |               | FACSIMILE NUMBER                        |                     |
| E-MAIL ADDRESS                                                                            | wilmari.kruger@labour.gov.za                                                                                                                                                                                                                                        |               | E-MAIL ADDRESS                          |                     |
| SUPPLIER INFORMATION                                                                      |                                                                                                                                                                                                                                                                     |               |                                         |                     |
| NAME OF BIDDER                                                                            |                                                                                                                                                                                                                                                                     |               |                                         |                     |
| POSTAL ADDRESS                                                                            |                                                                                                                                                                                                                                                                     |               |                                         |                     |
| STREET ADDRESS                                                                            |                                                                                                                                                                                                                                                                     |               |                                         |                     |
| TELEPHONE NUMBER                                                                          | CODE                                                                                                                                                                                                                                                                |               | NUMBER                                  |                     |
| CELLPHONE NUMBER                                                                          |                                                                                                                                                                                                                                                                     |               |                                         |                     |
| FACSIMILE NUMBER                                                                          | CODE                                                                                                                                                                                                                                                                |               | NUMBER                                  |                     |
| E-MAIL ADDRESS                                                                            |                                                                                                                                                                                                                                                                     |               |                                         |                     |
| VAT REGISTRATION NUMBER                                                                   |                                                                                                                                                                                                                                                                     |               |                                         |                     |

|                                                                                                   |                                                                                    |                                                                             |                                                                                                      |                               |      |
|---------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------|-------------------------------|------|
| SUPPLIER COMPLIANCE STATUS                                                                        | TAX COMPLIANCE SYSTEM PIN:                                                         |                                                                             | OR                                                                                                   | CENTRAL SUPPLIER DATABASE No: | MAAA |
| 1.1.1.1<br>ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED? | <input type="checkbox"/> Yes <input type="checkbox"/> No<br>[IF YES ENCLOSE PROOF] | 1.1.1.2<br>RE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED? | <input type="checkbox"/> Yes <input type="checkbox"/> No<br>[IF YES, ANSWER THE QUESTIONNAIRE BELOW] |                               |      |

**QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS**

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

## PART B

### TERMS AND CONDITIONS FOR BIDDING

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

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

SIGNATURE OF BIDDER:

.....

CAPACITY UNDER WHICH THIS BID IS SIGNED:

.....

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

DATE:

.....

**PRICING SCHEDULE**  
(Professional Services)

|                      |               |
|----------------------|---------------|
| NAME OF BIDDER:..... | BID NO.:      |
| CLOSING TIME 11:00   | CLOSING DATE: |

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

|                        |             |                         |
|------------------------|-------------|-------------------------|
| ITEM<br>CURRENCY<br>NO | DESCRIPTION | BID PRICE IN RSA        |
| INCLUDED)              |             | **(ALL APPLICABLE TAXES |

| Project Monitoring and support Staff                                                   | Maximum Billable Hours per annum | Rate (AGSA) approved rates) | VAT | Total Bid Price (including VAT) |
|----------------------------------------------------------------------------------------|----------------------------------|-----------------------------|-----|---------------------------------|
| Project Lead/ Director                                                                 | 3 500                            | R                           | R   | R                               |
| Project Managers (1) Minimum                                                           | 3 500 each                       | R                           | R   | R                               |
| Project Team leaders (2) Minimum                                                       | 2 500 each                       | R                           | R   | R                               |
| Project Team members (4) Minimum                                                       | 2 500 each                       | R                           | R   | R                               |
| Secretarial resource (3)                                                               | 2 500 each                       | R                           | R   | R                               |
| Financial and accounting resources (2)                                                 | 2 500 each                       | R                           | R   | R                               |
| Actual Disbursements Including VAT                                                     | Based on actual expenses         | R                           | R   | R                               |
| TOTAL BID PRICE PER DELIVERABLE INCLUDING THE TOTAL APPLICABLE TAXES                   |                                  | R                           | R   | R                               |
| TOTAL BID PRICE INCLUDING *ALL APPLICABLE TAXES FOR A PERIOD OF THIRTY-SIX (36) MONTHS |                                  |                             |     | R                               |

NB: The AGSA approved rates must be used as a guide for price quotation.

| Project Management Office and support Staff                                       | Maximum Billable Hours per annum | Rate (AGSA) approved rates) | VAT | Total Bid Price (including VAT) |
|-----------------------------------------------------------------------------------|----------------------------------|-----------------------------|-----|---------------------------------|
| Project Lead/Director (1) Minimum                                                 | 3 500                            | R                           | R   | R                               |
| Project Manager (4) Minimum                                                       | 3 500                            | R                           | R   | R                               |
| Secretarial resources (4)                                                         | 2500 each                        | R                           | R   | R                               |
| Legal resources Team (3)                                                          | 2500 each                        | R                           | R   | R                               |
| Legal Resources Seniors(3)                                                        | 2500 each                        | R                           | R   | R                               |
| M&E Resources (8)                                                                 | 2500 each                        | R                           | R   | R                               |
| Financial and accounting resources - Managers (2)                                 | 2500 each                        | R                           | R   | R                               |
| Finance team members (6)                                                          | 2500 each                        | R                           | R   | R                               |
| Actual Disbursements Including VAT                                                | Based on actual expenses         | R                           | R   | R                               |
| TOTAL BID PRICE PER DELIVERABLE INCLUDING THE TOTAL APPLICABLE TAXES              |                                  | R                           | R   | R                               |
| TOTAL BID PRICE INCLUDING *ALL APPLICABLE TAXES FOR A PERIOD OF SIXTY (60) MONTHS |                                  |                             |     | R                               |

**Important notes:**

- *Total Bid Price (Including VAT) will be used in the evaluation process for bid price scoring in terms of PPPFA.*
- *The cost of all air travel, all out-of-pocket expenses, related accommodation, car rental cost and parking, that is incurred by the service provider's personnel in providing the required service to the Unemployment Insurance Fund should be billed under disbursements item on the fee structure.*
- *\* - "All applicable taxes" refers to value-added tax for each deliverable.*

## BIDDER'S DISCLOSURE

### 1. PURPOSE OF THE FORM

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

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

### 2. Bidder's declaration

- 2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest<sup>1</sup> in the enterprise,

employed by the state?

**YES/NO**

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

| Full Name | Identity Number | Name of State institution |
|-----------|-----------------|---------------------------|
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |

<sup>1</sup> 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.



|  |  |  |
|--|--|--|
|  |  |  |
|  |  |  |

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

2.2.1 If so, furnish particulars:

.....  
 .....

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

2.3.1 If so, furnish particulars:

.....  
 .....

### 3 DECLARATION

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

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium<sup>2</sup> will not be construed as collusive bidding.

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



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

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

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

|           |                |
|-----------|----------------|
| .....     | .....          |
| Signature | Date           |
| .....     | .....          |
| Position  | Name of bidder |



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

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

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

### 1. GENERAL CONDITIONS

- 1.1 The following preference point systems are applicable to invitations to tender:
- the 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).

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

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

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

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

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

The maximum points for this tender are allocated as follows:

|                                                  | POINTS     |
|--------------------------------------------------|------------|
| PRICE                                            | 90         |
| SPECIFIC GOALS                                   | 10         |
| <b>Total points for Price and SPECIFIC GOALS</b> | <b>100</b> |

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

### 2. DEFINITIONS



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

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

#### 3.1. POINTS AWARDED FOR PRICE

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

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

80/20

or

90/10

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

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

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

##### 3.2.1. POINTS AWARDED FOR PRICE

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

80/20

or

90/10

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

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmax = Price of highest acceptable tender



#### 4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
  - (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,
- then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

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

*(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.*

*Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)*

| The specific goals allocated points in terms of this tender | Number of points allocated (90/10 system)<br>(To be completed by the organ of state) | Number of points allocated (80/20 system)<br>(To be completed by the organ of state) | Number of points claimed (90/10 system)<br>(To be completed by the tenderer) | Number of points claimed (80/20 system)<br>(To be completed by the tenderer) |
|-------------------------------------------------------------|--------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|------------------------------------------------------------------------------|------------------------------------------------------------------------------|
| Black ownership (100%)                                      | 5                                                                                    | 10                                                                                   |                                                                              |                                                                              |
| Women ownership (51-100%)                                   | 2                                                                                    | 5                                                                                    |                                                                              |                                                                              |
| 3. Youth ownership (51-100%)                                | 2                                                                                    | 3                                                                                    |                                                                              |                                                                              |
| 4. Disability (51-100%)                                     | 1                                                                                    | 2                                                                                    |                                                                              |                                                                              |
|                                                             |                                                                                      |                                                                                      |                                                                              |                                                                              |
|                                                             |                                                                                      |                                                                                      |                                                                              |                                                                              |
|                                                             |                                                                                      |                                                                                      |                                                                              |                                                                              |

## DECLARATION WITH REGARD TO COMPANY/FIRM

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

4.4. Company registration number: .....

4.5. TYPE OF COMPANY/ FIRM

Partnership/Joint Venture / Consortium

One-person business/sole propriety

Close corporation

Public Company

Personal Liability Company

(Pty) Limited

Non-Profit Company

State Owned Company

[TICK APPLICABLE BOX

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

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
  - (a) disqualify the person from the tendering process;
  - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
  - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
  - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
  - (e) forward the matter for criminal prosecution, if deemed necessary

.....  
SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME: .....

DATE: .....

ADDRESS: .....



## THE NATIONAL TREASURY

Republic of South Africa



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## GOVERNMENT PROCUREMENT: GENERAL CONDITIONS OF CONTRACT

July 2010

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

**NOTES**

The purpose of this document is to:

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

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

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

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## General Conditions of Contract

### 1. Definitions

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

RSA.

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

obligations of the supplier covered under the contract.

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

## **2. Application**

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

## **3. General**

- 3.1 Unless otherwise indicated in the bidding documents, the purchaser shall not be liable for any expense incurred in the preparation and submission of a bid. Where applicable a non-refundable fee for documents may be charged.
- 3.2 With certain exceptions, invitations to bid are only published in the Government Tender Bulletin. The Government Tender Bulletin may be obtained directly from the Government Printer, Private Bag X85, Pretoria 0001, or accessed electronically from [www.treasury.gov.za](http://www.treasury.gov.za)

## **4. Standards**

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

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

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

## **6. Patent rights**

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

**7. Performance security**

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

**8. Inspections, tests and analyses**

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

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

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

## **9. Packing**

- 9.1 The supplier shall provide such packing of the goods as is required to prevent their damage or deterioration during transit to their final destination, as indicated in the contract. The packing shall be sufficient to withstand, without limitation, rough handling during transit and exposure to extreme temperatures, salt and precipitation during transit, and open storage. Packing, case size and weights shall take into consideration, where appropriate, the remoteness of the goods' final destination and the absence of heavy handling facilities at all points in transit.

- 9.2 The packing, marking, and documentation within and outside the packages shall comply strictly with such special requirements as shall be expressly provided for in the contract, including additional requirements, if any, specified in SCC, and in any subsequent instructions ordered by the purchaser.

## **10. Delivery and documents**

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

- 10.2 Documents to be submitted by the supplier are specified in SCC.

## **11. Insurance**

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

## **12. Transportation**

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

## **13. Incidental services**

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

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

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

#### 14. Spare parts

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

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

#### 15. Warranty

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

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

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

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

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

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

**16. Payment**

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

**17. Prices**

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

**18. Contract amendments**

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

**19. Assignment**

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

**20. Subcontracts**

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

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

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

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

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

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

## **22. Penalties**

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

## **23. Termination for default**

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

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

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

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

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

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

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

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

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

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

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

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

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

**25. Force  
Majeure**

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

**26. Termination  
for insolvency**

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

**27. Settlement of  
Disputes**

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

**28. Limitation of  
liability**

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

- (b) the aggregate liability of the supplier to the purchaser, whether under the contract, in tort or otherwise, shall not exceed the total contract price, provided that this limitation shall not apply to the cost of repairing or replacing defective equipment.

**29. Governing language**

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

**30. Applicable law**

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

**31. Notices**

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

**32. Taxes and duties**

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

**33. National Industrial Participation (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.

Js General Conditions of Contract (revised July 2010)

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## ANNEXURE H: INDEMNITY FORM

### INFORMATION SECURITY INDEMNITY FORM

This form **MUST** be fully completed by the duly authorised representative of the company bidding for services at the UIF. Failure to complete this form fully is an immediate disqualification.

I \_\_\_\_\_ (full name and surname of the official),  
ID \_\_\_\_\_ on behalf of (company name)

Declares and confirm that should my company be appointed to render services by the UIF, I/We pledge that the data, and or information collected from the UIF, or from the UIF clients will remain the assets of the UIF and shall be kept in line with the information security as well as the POPI Act of South Africa throughout the term of the assignment. And I/we will access and/or process the confidential data or information obtained from the UIF or from the UIF clients using only authorized hardware, software or other authorized equipment. I/we further will make available the company's POPI Act policies and procedures to the UIF at the time of contracting should we be considered for appointment.

Should any of the above be breached in terms of basic information security services, i.e., confidentiality, integrity and availability, I/We will be held responsible and shall account to any leak, loss or damage whatsoever.

Over and above, I/we will ensure that the resources to be deployed throughout the assignment have been vetted to meet the legislations stated above, and should any of the resources deployed found to have breached the legislations above, I/we will be held responsible for the leak, loss or damage whatsoever.

I/we understand and agree to abide by the conditions outlined in this pledge, and they will remain in force throughout the period of the assignment.

\_\_\_\_\_  
NAME OF COMPANY REPRESENTATIVE

\_\_\_\_\_  
DATE

\_\_\_\_\_  
SIGNATURE

## Annexure I1– Team Composition

### Project Monitoring Team

Team composition (This table format must be duplicated for each additional team proposed):

| No. | Resource Role                  | Name of Resource | No. of Years of Relevant Experience | Qualifications |
|-----|--------------------------------|------------------|-------------------------------------|----------------|
| 1   | Project Lead/Director          |                  |                                     |                |
| 2   | Project Monitoring Manager     |                  |                                     |                |
| 3   | Project Monitoring Team Leader |                  |                                     |                |
| 4   | Project Monitoring Team Leader |                  |                                     |                |
| 5   | Project Monitoring Team member |                  |                                     |                |
| 6   | Project Monitoring Team member |                  |                                     |                |
| 7   | Project Monitoring Team member |                  |                                     |                |
| 8   | Project Monitoring Team member |                  |                                     |                |

### Support Team

Team composition (This table format must be duplicated for each additional team proposed):

| No. | Resource Role                     | Name of Resource | No. of Years of Relevant Experience | Qualifications |
|-----|-----------------------------------|------------------|-------------------------------------|----------------|
| 1   | Secretarial Resources             |                  |                                     |                |
| 2   | Secretarial Resources             |                  |                                     |                |
| 3   | Secretarial Resources             |                  |                                     |                |
| 4   | Financial and Accounting resource |                  |                                     |                |
| 5   | Financial and Accounting resource |                  |                                     |                |

Summarised CV's as well as qualifications of all team members must be included in the proposal and also be submitted with the fully completed Annexure I1. Please ensure that CV's demonstrate the resources experience in the discipline for which you have proposed them e.g. Project Manager to have performed similar work previously and Secretariat to have performed secretarial services using minute taking software packages or other tools.

## Annexure I2 – Team Composition

### Project Management Office Team

| No. | Resource Role         | Name of Resource | No. of Years of Relevant Experience for proposed position within Team | Qualifications |
|-----|-----------------------|------------------|-----------------------------------------------------------------------|----------------|
| 1   | Project Lead/Director |                  |                                                                       |                |
| 2   | Project Manager       |                  |                                                                       |                |
| 3   | Project Manager       |                  |                                                                       |                |
| 4   | Project Manager       |                  |                                                                       |                |
| 4   | Project Manager       |                  |                                                                       |                |

### Support Team

| No. | Resource Role                     | Name of Resource | No. of Years of Relevant Experience | Qualifications |
|-----|-----------------------------------|------------------|-------------------------------------|----------------|
| 1   | Secretarial Resources             |                  |                                     |                |
| 2   | Secretarial Resources             |                  |                                     |                |
| 3   | Secretarial Resources             |                  |                                     |                |
| 4   | Secretarial Resources             |                  |                                     |                |
| 5   | Secretarial Resources             |                  |                                     |                |
| 6   | Secretarial Resources             |                  |                                     |                |
| 7   | Legal Resources                   |                  |                                     |                |
| 8   | Legal Resources                   |                  |                                     |                |
| 9   | Legal Resources                   |                  |                                     |                |
| 10  | Legal Resources                   |                  |                                     |                |
| 11  | Legal Resources                   |                  |                                     |                |
| 12  | Legal Resources                   |                  |                                     |                |
| 13  | M&E Resources                     |                  |                                     |                |
| 14  | M&E Resources                     |                  |                                     |                |
| 15  | M&E Resources                     |                  |                                     |                |
| 16  | M&E Resources                     |                  |                                     |                |
| 17  | Financial and Accounting resource |                  |                                     |                |
| 18  | Financial and Accounting resource |                  |                                     |                |
| 19  | Financial and Accounting resource |                  |                                     |                |
| 20  | Financial and Accounting resource |                  |                                     |                |
| 21  | Financial and Accounting resource |                  |                                     |                |
| 22  | Financial and Accounting resource |                  |                                     |                |
| 23  | Financial and Accounting resource |                  |                                     |                |
| 24  | Financial and Accounting resource |                  |                                     |                |

Summarised CV's as well as qualifications of all team members must be included in the proposal and also be submitted with the fully completed Annexure I2. Please ensure that CV's demonstrate the resources experience in the discipline for which you have proposed them e.g. Project Manager to have performed similar work previously and Secretariat to have performed secretarial services using minute taking software packages or other tools.