



AIDC Eastern Cape SOC Ltd

**THE APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE
EMPLOYEE BENEFIT ADVISORY AND INTERMEDIARY
SERVICES – INCLUDING BOTH RISK AND REMUNERATION
BENEFITS SERVICES FOR (5) YEARS FOR AIDC-EC.**

BID NUMBER: RFQ1013/2025

BIDDER:

CLOSING DATE: 22 August 2025

BRIEFING DATE: 15 August 2025
Microsoft Teams
Meeting ID: 355 373 313 492 9
Passcode: bd2mL97K

PRICE OFFER:

CSD NUMBER:

ETHICS & FRAUD HOTLINE REPORTING CHANNELS - HOTLINE DETAILS	
Hotline Name:	AIDC-EC Ethics & Fraud Hotline
Contact Number:	0800 116 665
WhatsApp Number:	0860 004 004
Dedicated Email Address:	AIDC-ECec@behonest.co.za
SMS Number:	48691
Free Post	BNT165, Advance Call Pty (Ltd), Brooklyn Square, 0075
Website Link	www.behonest.co.za



AIDC Eastern Cape SOC Ltd

REQUEST FOR QUOTATION

BID NUMBER: RFQ1013/2025

Bids are hereby invited for **THE APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE EMPLOYEE BENEFIT ADVISORY AND INTERMEDIARY SERVICES – INCLUDING BOTH RISK AND REMUNERATION BENEFITS SERVICES FOR (5) YEARS FOR AIDC-EC.**

The Automotive Industry Development Centre Eastern Cape (AIDC-EC) a wholly owned company by ECDC, is the province's institutional mechanism that is mandated to promote and facilitate the automotive industry growth and development by supporting the government's industrial policy and other strategic initiatives that will contribute towards the provincial economic growth. As a developmental institution, AIDC-EC has positioned itself to contribute to the growth of the South African automotive industry; support the government's automotive-related objectives; contribute to the government and industry's goals of continuous growth and sustainable job creation, and support ECDC's macro development plan and consequently contribute to the provincial growth and development plans.

The objective of this RFQ is to identify a service provider who would be responsible to provide employee benefit advisory and intermediary services – including both risk and remuneration benefits services for (5) years for AIDC-EC.

Activity		Date	Time
1	Issuing of bid documents to Service Providers	08/08/2025	N/A
2	Briefing Date	15/08/2025	11:00
2	Date of submission of bids	29/08/2025	11:00

Bids proposals must be Emailed to the emails stated below, by not later than 11h00 on Friday, 22 August 2025. For all enquiries regarding the bid document please contact SCM at 041 393 2100, e-mail: procurement@AIDC-ECec.co.za during normal working hours.



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1. EVALUATION CRITERIA

Pre-Qualification

Service Providers are to meet all the Mandatory Requirements to be evaluated further. Failure to submit the Mandatory Requirements as stipulated will result in the bidder being disqualified.

A Three (3) Stage evaluation process will be employed. In Stage one, all bids received will be evaluated against bid requirements. Only those service providers who meet all the compliance criteria will proceed to stage 2 where bids will be assessed for functionality. Bidders who obtain a minimum score of 30 points and above on functionality will be assessed during Stage 3 for Price and Specific goals in accordance with the Preferential Procurement Regulations of 2022 utilizing 80/20 preference point system.

All submitted Bids will be evaluated in the following stages:

Pre-Qualification	Service Providers are to meet all the Mandatory Requirements to be evaluated further. Failure to submit the Mandatory Requirements as required will result in the bid being disqualified.
Stage 1	Compliance with bid Requirements <ul style="list-style-type: none">▪ Virtual Compulsory Briefing session▪ Confirmation of valid registration with Financial Sector Conduct Authority ("FSCA")▪ Proof of professional liability insurance.
Stage 2	Functionality: Involves an evaluation of Functionality only. At this stage Bidders must score the minimum score of 30 points for functionality before they are evaluated in terms of the preferential procurement points.
Stage 3	Preference point system: Specific goals



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2. TERMS OF REFERENCE AND SCOPE OF WORK

INTRODUCTION – BACKGROUND TO THE AIDC-EC

AIDC-EC Eastern Cape (Soc) Ltd is an Eastern Cape Provincial Government owned proprietary company established to **primarily** provide support to the SA Automotive Industry, in its drive for global competitiveness.

BACKGROUND

The AIDC-EC does not have an employee benefits scheme. The AIDC-EC wishes to establish an Employee Benefit Scheme, which includes a Retirement Fund and Risk Benefits, for their workforce.

Presently, AIDC-EC has 55 employees, with a total average monthly salary bill of approximately ±R4 million.

The identified service provider will conduct a need assessment and analysis of the AIDC-EC profile for customized benefit structure.

The identified service provider must guide the establishment for an internal governing structure to monitor the service offerings.

The AIDC-EC's Organogram will be shared upon request:

The bid is open to Pension Fund brokers, insurance, and direct providers of the Employee Benefit scheme, to provide employee benefit advisory and intermediary services – including both risk and remuneration benefits AIDC-EC intends to appoint a service provider that will offer the following:



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Important Factors to be considered

1.Retirement Fund

Establish a retirement fund for the AIDC-EC or facilitate participate in an umbrella fund in which any other Employers and their Employees participate to benefit from economies of scale in terms of pooling of funds for investment.

2.Risk Benefits

RISK BENEFIT DESCRIPTION
Group life benefit
Lump sum Vs Monthly disability benefit
Funeral benefit
Dread disease benefit
Income protector benefit
Retirement age: 65 years

The table above is provided to give the bidders an indication of the types of risk benefit products considered by AIDC-EC. This list is not an exhaustive list. This is subject to change in consultation with the preferred service provider.

3. Medical aid

A suitable Health insurance that caters for the comprehensive well-being of employees of the AIDC-EC.



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The service provider must meet the following:

PENSION FUND SERVICES	
Assistance provided to AIDC-EC employees in terms of their pension fund portfolios.	
Consulting services which include, but not limited to:	
<ul style="list-style-type: none"> • Regular product presentations and training, and • Communication, including newsletters, hot topics etc. 	
Strategic services which should include but not limited:	
<ul style="list-style-type: none"> • Year-end revision process, • Employee Benefit Advisory and Intermediary Services to AIDC-EC profiles, • Fund portfolio and option comparisons, • Legislative review and updates, • Market trend analysis and Employee Benefit Advisory and Intermediary Services. • Reporting which should include, but not limited to: <ul style="list-style-type: none"> ➤ Billing results and analysis quarterly (bidder to submit quarterly reports) ➤ Submit members option reports quarterly, ➤ Risk management, ➤ Executive reporting, and ➤ Benchmarking review. 	
Membership and contribution management.	
Provide unique value-added services.	
Submission of annual financial statements for the AIDC-EC Pension Fund.	
Digital platform for members to access and manage their benefit portfolio.	



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Employee Benefit Advisory and Intermediary Services to AIDC-EC

Risk Benefit Services
Assistance provided to AIDC-EC Employees Benefit Advisory and Intermediary Services in terms of their risk cover portfolios.
Consulting services which include, but not limited to: <ul style="list-style-type: none"> • Regular product presentations and training, and • Communication, including newsletters, hot topics etc.
Strategic services which should include: <ul style="list-style-type: none"> • Year-end revision process, • Review of Profile of members, • Risk cover portfolio and option comparisons, • Legislative review and updates, and • Market trend analysis and forecasting.
Reporting which should include, but not limited to: <ul style="list-style-type: none"> • Billing results and analysis, • Submit members option reports quarterly, • Risk management, • Executive reporting, and • Benchmarking review.
Membership and contribution management.
<i>Provide unique value-added services.</i>
Digital platform for members to access and manage their benefit portfolio.

Medical Aid Services to AIDC-EC



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Medical Aid Services
Assistance provided to AIDC-EC Employees Benefit Advisory and Intermediary Services in terms of their Medical aid portfolios.
Consulting services which include, but not limited to: <ul style="list-style-type: none"> • Regular product presentations and training, and • Communication, including newsletters, hot topics etc.
Strategic services which should include: <ul style="list-style-type: none"> • Year-end revision process, • Review of Profile of members, • Risk cover portfolio and option comparisons, • Legislative review and updates, and • Market trend analysis and forecasting.
Reporting which should include, but not limited to: <ul style="list-style-type: none"> • Billing results and analysis, • Submit members option reports quarterly, • Risk management, • Executive reporting, and • Benchmarking review.
Membership and contribution management.
<i>Provide unique value-added services.</i>
Digital platform for members to access and manage their benefit portfolio.
Wellness services will be required.



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Remuneration Consultant Services to AIDC-EC

Remuneration Consultant Services
The Remuneration consultant will be engaged to provide professional services in the administration of employee benefits and structuring of salary packages.
<p>Consulting services which include, but not limited to:</p> <ul style="list-style-type: none"> • To manage and administer employee salary packages effectively and in compliance with applicable legislation. • To structure and optimize total salary packages in line with the organizations remuneration policy and tax efficiency goals. • To ensure employees understand and make informed decisions about their benefits.
<p>Strategic services which should include:</p> <ul style="list-style-type: none"> • Assess current employee benefits offerings (retirement funds. Group life cover, etc). • Make recommendations for improvements or cost-saving alternatives. • Manage the onboarding and off-boarding of employees with respect to benefits. • Liaise with benefits providers (Medical schemes. Pension funds, etc). • Conduct annual review of benefits with benchmarking against industry standards.
<p>Reporting which should include, but not limited to:</p> <ul style="list-style-type: none"> • Comprehensive Employee Benefits Report (Initial assessment and annual update) • Structure Salary package guidelines and template • Individual employee benefit statements on request • Monthly/quarterly benefit performance dashboards.



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Provide unique value-added services.

Provide a digital platform for members to access and manage their benefits portfolios.



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3. EVALUATION CRITERIA

Pre-Qualification

Service Providers are to meet all the Mandatory Requirements to be evaluated further. Failure to submit the Mandatory Requirements as stipulated will result in the bidder being disqualified.

A Three (3) Stage evaluation process will be employed. In Stage one, all bids received will be evaluated against compliance requirements. Only those service providers who meet all the compliance criteria will proceed to stage 2 where bids will be assessed for functionality. Bidders who obtain a minimum score of 80 points and above on functionality will be required to presentation and onsite inspection before being assessed during Stage 3 for Specific goals in accordance with the Preferential Procurement Regulations of 2022 utilizing 20 preference point system.

All submitted Bids will be evaluated in the following stages:

Pre-Qualification	Service Providers are to meet all the Mandatory Requirements to be evaluated further. Failure to submit the Mandatory Requirements as required will result in the bid being disqualified.
Stage 1	Compliance with bid Requirements <ul style="list-style-type: none">▪ Virtual Compulsory Briefing session▪ Confirmation of valid registration with Financial Sector Conduct Authority ("FSCA")▪ Proof of professional liability insurance.
Stage 2	Functionality: Involves an evaluation of Functionality only. At this stage Bidders must score the minimum score of 80 points for functionality and qualify with presentation and onsite inspection before they are evaluated in terms of the preferential procurement points.
Stage 3	Preference point system: Specific goals



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	<u>PRE-QUALIFICATION MANDATORY requirements</u> Description	Mandatory Requirement	Disqualification if not submitted with Tender or Bidder is found to be Non-Compliant at the Time of Bid Close
1.	<p>Bidders must be registered on the National Treasury Central Supplier Database (CSD).</p> <p>The following information will be verified on the National Treasury Central Supplier Database:</p> <ul style="list-style-type: none"> • Business Registration including details of directorship and membership, - The bidders' Business Registration Status will be verified on the CSD prior to the bid award and where the preferred bidder's status is under deregistration, 7 working days will be granted for remedy, failing which the bidder will be disqualified. • ID Number, • Government Employee • Tender Defaulting and Restriction Status. Should the Tender be a restricted supplier or a defaulting supplier they will be disqualified. <p><u>Onus on the Service Provider</u></p> <p>Onus is on the Service Provider to make sure that all these are active and compliant on the CSD at the time of bid closing and tender award.</p> <p>AIDC-EC will verify if the Service Provider has been registered on CSD. Service Provider to submit CSD</p>	Yes	Yes



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	<p>Number as required in the Cover Page. It is the responsibility of the Service Provider to ensure that the correct CSD Number is provided.</p> <p>If Service Provider is not registered on CSD by the time of closing of the bid, they will not be considered for evaluation.</p> <p><u>Directors/Employees in the Service of State</u></p> <p>Where a person within the Bidding Entity is an Employee of the State, Bidder should.</p> <p>a) submit a signed letter on a letter head from their Accounting Officer/Accounting Authority (AO/AA of the Government Institution where they are employed) stating that they are not prohibited from conducting business with the State in terms of Section 8 of the Public Administration Management Act, 2012 (Act No.11 of 2014- “the PFMA”)</p> <p>b) submit a signed letter on a letter from their AO/AA granting permission to perform other remunerative work outside of their employment where the PAMA does not apply to such an employee.</p> <p>AIDC-EC reserves the right to verify such information from their AO/AA.</p> <p><u>JV's and Consortium</u></p> <p>Where the Bidder is a JV/Consortium, each firm must be registered on the CSD.</p>		
2.	<p>Tax Compliance Requirements:</p> <ul style="list-style-type: none"> Bidders must ensure compliance with their tax obligations. 	Yes	Yes



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	<ul style="list-style-type: none"> • In Bids where Consortia/Joint venture/Sub-Contractors are involved; each party must submit a separate proof of Tax Compliance Status. • The bidders' Tax status will be verified on the CSD prior to the bid award and where the preferred bidders is not compliant, 7 working days will be granted for remedy, failing which the bidder will be disqualified. 		
3.	<p>Letter of Authority</p> <p>A Letter of Authority/Board Resolution/Delegation of Authority Matrix to complete and sign this Bid Document is required in the following instances.</p> <ul style="list-style-type: none"> ✓ Where there is more than one (1) director / shareholder / trustee / members etc. in the Company/Trust/Close Corporation etc. (institution), the directors /shareholder /trustees /member etc., should delegate a person by means of submitting a duly signed Delegation of Authority granting the authorized personnel to sign the Bid Document on the Bidder's behalf. <p>OR</p> <p>Where there is only one Director and the person completing the document is not the Director. The Director should delegate a person by means of submitting a duly signed Delegation of Authority granting the authorized personnel to sign the Bid Document on the Bidder's behalf.</p>	Yes	Yes
4.	<p>Annexure A – Supplier Information (Completed and Signed by the Delegated Authority) Attach Delegation of Authority.</p>	Yes	Yes



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5.	Annexure C– Form of offer and acceptance offer (Signed and Completed by delegated authority)	Yes	Yes
6.	Annexure D – Pricing Schedule (Signed and Completed by delegated authority)	Yes	Yes
7.	Annexure E– (SBD 4): Bidders Disclosure (To be Signed and Completed by the Duly Authorised Signatory).	Yes	Yes
8.	<p>Annexure F - Statement of Consent to Data Processing</p> <p>(To be Signed and Completed by the Duly Authorised Signatory).</p> <p>Non-submission of this Annexure with the Tender will not result disqualification, however, Bidder will be requested to fill in the Annexure in order for the AIDC-EC to process and evaluate their Tender as per POPI Act</p>	Yes	<p>No</p> <p>(This is required for evaluation in order for AIDC-EC to process the Bidder's Tender</p>
9.	<p>Annexure G– (SBD 6.1.): Preferential Points Claim (Signed and Completed). Preferential Points Claim (Signed and Completed).</p> <p><u>Note</u></p> <p>Failure to submit the preference points claim and proof of address may result in awarding of 0 (zero) points preference points under Eastern Cape locality.</p> <p>51% ownership of youth and women in the company/enterprise will be verified on the CSD report and points will be allocates accordingly.</p> <p>CSD report will be used to confirm other specific goals</p>	No	No
10.	Annexure E: Declaration with regards to Company /Firm Location	No	No



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<p>Attach a proof of address to claim points for the Eastern Cape base locality as the specific goal as advised in the tender / quotation qualifies the company/firm for the PPR of 2022 preference points claim.</p> <p>This information will be verified from the FICA documents (Physical Address, Utility Bill, Telephone, Tax Clearance, lease agreement submitted by the bidder.</p> <p>Failure to submit the declaration and proof of address may result in awarding of 0 (zero) points preference points under Eastern Cape locality</p>		
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	The following will be applicable to Joint Ventures/Consortium		
11.	Consortium/Joint Venture Agreement or letter of intent to enter in a Consortium / Joint Venture signed by all Consortium Members who are Duly Authorized.	Yes	Yes
12.	Resolution of the Board of Directors to enter a Consortium/Joint Venture from each Employee Benefit Advisory and Intermediary Services.	Yes	Yes
13.	Letter of Authority of Signatory(individual) authorizing the Signatory to sign on behalf of the Consortium/JV. The Letter of Authority MUST be from each member firm and must be signed by all directors of each member firm (or Board Resolution will be accepted).	Yes	Yes



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14.	<p>Annexure F – (SBD 6.1.): Preferential Points Claim (Signed and Completed by all JV /Consortium mem</p> <p>Annexure F – (SBD 6.1.): Preferential Points Claim (Signed and Completed).</p> <p>Failure to submit the preference points claim and proof of address from each JV /Consortium member may result in awarding of 0 (zero) points preference</p>	No	No
15.	<p>Declaration with regards to Company /Firm Location</p> <p>Attach a proof of address to claim points for the Eastern Cape base locality as the specific goal as advised in the tender / quotation qualifies the company/firm for the PPR of 2022 preference points claim.</p> <p>This information will be verified from the FICA documents (Physical Address, Utility Bill, Telephone, Tax Clearance, lease agreement submitted by the</p>	No	No

STAGE 1: COMPLIANCE WITH BID REQUIREMENTS

- Virtual compulsory briefing session
- Confirmation of valid registration with Financial Sector Conduct Authority (“FSCA”)
- Proof of professional liability insurance.

NB: FAILURE TO PROVIDE ANY OF THE ABOVE WILL RESULT TO IMMEDIATE REJECTION OF THE BID.

STAGE 2: FUNCTIONALITY

Functionality	Max Points	Points Scored	Minimum Required
<p>COMPANY EXPERIENCE</p> <p>Demonstrate the ability and experience of work done in the past of a similar nature. The Company has confirmed</p>	25		10



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<p>experience of executing such an assignment. The service provider must present the details of the companies for which they have provided Employee Benefit Services.</p> <p>Scoring Guideline:</p> <ul style="list-style-type: none"> • 0 = Bidder has less than 10 years' experience. • 15 = Bidder 10 or more but less than 15 years' experience. • 25 = Bidder has more than 15 years' experience <p>NB: Proof of experience that will be acceptable is <u>ONLY</u> the reference forms attached to the bid document. The reference forms must be completed, signed and stamped by the client(s) previously serviced. Reference forms, which are incomplete or not in compliance with the above requirement will not be considered for evaluation.</p>			
<p>Recent letter of good standing from relevant regulatory body.</p>	50		50
<p>TEAM CAPABILITY</p> <p>Key personnel should include a Team Leader in the project team and other consultants/members as indicated below.</p> <p>Key Personnel must have a minimum of five years' experience and relevant qualifications and accreditation where applicable.</p> <p>Copies of certified certificates, CV's, proof of qualifications and accreditation must be attached to the proposal.</p>	25		20



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<p>Note: Failure to attach these will result in bidders forfeiting functionality points.</p> <p>Scoring Guideline:</p> <ul style="list-style-type: none"> • 15 = Project Lead is registered as a Representative at the FSCA and has a minimum of (10) years' experience. • 7 = Project Manager has a minimum of (3) years' experience. • 3 = Support Team has an average of two (2) years' experience in employee benefits. <p>Failure to meet the above including the submission of requested documentation will result in zero points being scored by the bidder.</p>			
GRAND TOTAL	100		80

Bidders must obtain a minimum score of **80 points out of 100 points** on Stage 2 (Functionality) in order to be considered for presentation and onsite inspection then will be assessed for evaluation in Stage 3 (SPECIFIC GOALS).

PRESENTATION / DEMONSTRATION

The AIDC-EC reserves the right to request presentations/demonstrations from the short- listed Bidders as part of the bid evaluation process. If a request is made for a presentation the presentation is compulsory, and non-attendance will result in a disqualification of your application.

NB: Successful service provider will be requested for presentation and On-site inspection of the company facilities.



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Presentation will be based on the following topics:

The bidder must provide a detailed explanation of their capability to perform the following services. This must include:

1.1 An overview of your company including ownership, number of employees and offices, organisational structure, etc.

1.2 Access to web-based tools to manage the client customer relationship.

1.3 Ability to assist the AIDC-EC with identifying competitive market offerings and placements of our plans, annual renewals, investment portfolios etc.

1.4 Bidder's ability to comply to a turnaround time of 48 hours for resolving queries.

1.5 The bidder must provide a detailed project implementation plan, clearly outlining the key activities, deliverables and timelines and communication strategy.

Bidders who comply with all the requirements of stage one will be subjected to presentations, which may include, but is not limited to, a service demonstration of their proposal to AIDC-EC. This provides an opportunity for the bidder to clarify or elaborate on the proposal. This is a fact finding and explanation session only and does not include negotiation. AIDC-EC will schedule the time and location of these presentations.

WEIGHTED SCORING FOR THE PRESENTATION

1 – Poor	2 – Below average	3 - Average	4 – Meet Expectations	5 - Excellent
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STAGE 3 - PREFERENCE POINT SYSTEM

CRITERIA	POINTS
Specific goals	20
Total	20



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Specific goals points will be calculated as described in the Preferential Procurement Regulations of 2022. SBD 6.1 form must be used to claim points for specific goals for the company.

A copy of CSD report and Proof of Address must be submitted as proof of specific goals. When the above documentation is not provided as proof the company will automatically score zero.

POINTS FOR SPECIFIC GOALS (R50K to R1mil)			
Specific Goals Category	Weighting (of 20 Points)	Number of points	Acceptable Evidence
Locality (Enterprises located in the Eastern Cape Province)	60%	12	Proof of address
Enterprise located outside the Eastern Cape			
>51% Women Ownership	20%	4	CSD report.
<50% Women Ownership		0	
>51% Youth Ownership	20%	4	CSD report.
<50% Youth Ownership		0	
TOTAL	100%	20	

BIDDERS SHALL TAKE NOTE OF THE FOLLOWING BID CONDITIONS:

- The Automotive Industry Development Centre Eastern Cape Supply Chain Management Policy will apply.
- Bidders must be registered with the National Treasury Central Supplier Database (CSD) and provide a copy of CSD full report for the month of August 2025.
- Automotive Industry Development Centre Eastern Cape does not bind itself to accept the highest bid or any other bid and reserves the right to accept the whole or part of the bid.
- Bids which are late, incomplete, unsigned, will not be accepted.



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- Bids submitted are to hold good for a period of 90 days
- A service level agreement shall be signed with the successful service provider.
- AIDC-EC reserves the right to terminate the contract if not satisfied with the work produced by the service provider. Only bidders that have met the requirements of the proposal / specification shall be considered during the adjudication process.
- Companies that bid as joint venture must submit an official signed business agreement by both parties. If the service provider does not meet this requirement, it will be automatically disqualified.
- The AIDC-EC Bid Committee and the Supply Chain Management Unit may, before a bid is adjudicated or at any time during the bidding process, oblige a bidder to substantiate any claims it may have made in its bid documents.

The following documents must be submitted with the tender document:

- Proof of registration with Treasury Central Supplier Database (CSD)
- Company Registration Documents and shareholder's certificate showing ownership details of the Company.
- Proof of address
- SBD 4, 6.1
- Companies who bid as a joint venture must supporting documents for both companies and a JV agreement.



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CONDITIONS SPECIFIC TO THIS BID

1. RESPONSIBILITIES AND DUTIES

Notwithstanding the fact that a description of the services has been provided above, AIDC-EC shall be entitled to request additional services related to deliverables required to ensure the successful completion of the services set out above on such further terms and conditions as may be agreed between the parties in writing.

The service provider shall always faithfully and timeously carry out and perform the Services and shall use its best endeavours to properly conduct, improve, extend and develop the business of AIDC-EC in the provisioning of the services.

The Services shall as part of his duties, attend such meetings as may be required by AIDC-EC from time to time and submit weekly or monthly progress reports on the services as may be required and requested by AIDC-EC.

2. OBLIGATION TO PERFORM AND SUB-CONTRACTING

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

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

3. PERFORMANCE GUARANTEE

Within thirty (30) days of receipt of the notification of contract award, the successful bidder shall furnish to AIDC-EC the performance security of the amount specified above.

The proceeds of the performance security shall be payable to AIDC-EC as compensation for any loss resulting from the bidder's failure to complete his obligations under the contract.

The performance security shall be denominated in the currency of the contract or in a freely convertible currency acceptable to AIDC-EC and shall be in one of the following forms:

A bank guarantee or an irrevocable letter of credit issued by a reputable bank located in South Africa, acceptable to AIDC-EC, in the form provided in the bid documents or another form acceptable to AIDC-EC; or A cashier's or certified cheque



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The performance security will be discharged by AIDC-EC and returned to the bidder not later than thirty (30) days following the date of completion of the bidder's performance obligations under the contract, including any warranty obligations, unless otherwise specified in SCC.

Notwithstanding the provisions above, the bidder 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.

4. ANTI-DUMPING AND COUNTERVAILING DUTIES

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, AIDC-EC 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 AIDC-EC or AIDC-EC 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.

5. AIDC-EC FACILITIES

Unless otherwise agreed in writing by AIDC-EC, the Service Provider will work from its own office and provide its own facilities, such as transport, telephone, cell phone, fax and computer facilities to perform the services.

The service provider may use certain facilities made available by AIDC-EC to assist in performing the services, including but not limited to computer facilities, telephone and fax facilities and stationery. In this regard the service provider agrees to:

Abide by the health, safety and security measures as prescribed by AIDC-EC from time to time;
To use such accommodation and facilities entirely at his own risk and AIDC-EC shall not be liable for any loss or damage whatsoever and howsoever caused arising out of or in connection



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with the use of these items, other than loss or damage caused because of AIDC-EC's own wilful misconduct.

6. FORCE MAJEURE

If a force majeure situation arises, the bidder shall promptly notify AIDC-EC in writing of such condition and the case thereof. Unless otherwise directed by AIDC-EC in writing, the bidder 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.

7. RESPONSIBILITY TO BE PERFORMED

Delivery of the goods and performance of services shall be made by the bidder in accordance with the time schedule prescribed by AIDC-EC in the contract.

If at any time during performance of the contract, the bidder or its subcontractor(s) should encounter conditions impeding timely delivery of the goods and performance of services, the bidder shall promptly notify ECDC in writing of the fact of the delay, its likely duration and its cause(s). As soon as practicable after receipt of the bidder's notice, AIDC-EC shall evaluate the situation and may at his discretion extend the bidder'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.

AIDC-EC reserves the right to procure outside of the contract small quantities or to have minor essential services executed if an emergency arises, the bidder's point of supply is not situated at or near the place where the supplies are required, or the bidder's services are not readily available.

A delay by the bidder in the performance of its delivery obligations may render the bidder liable to the imposition of penalties, unless an extension of time is agreed upon without the application of penalties.

AIDC-EC 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



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unperformed services using the current prime interest rate calculated for each day of the delay until actual delivery or performance.

AIDC-EC may also consider termination of the contract.

8. DURATION OF THE CONTRACT

It is anticipated that the appointment will be made during August 2025. The service provider will be expected to be available and start immediately as soon as a Service Level Agreement is signed.

9. PAYMENTS AND TAX

Payments shall only be made in accordance with the fees as quoted in this documentation. Prices charged by the bidder for goods delivered and services performed under the contract shall not vary from the prices quoted by the bidder in this bid, with the exception of any price adjustments authorized at AIDC-EC's request for bid validity extension, as the case may be.

- ✓ Payments shall only be made in accordance with the fees as quoted in this documentation. Prices charged by the bidder for goods delivered and services performed under the contract shall not vary from the prices quoted by the bidder in this bid/RFQ, with the exception of any price adjustments authorized at AIDC-EC's request for bid validity extension, as the case may be.
- ✓ AIDC-EC will re-imburse the service provider for expenses and disbursements incurred subject to the submission of satisfactory proof that such expenses and disbursements have been incurred and subject to it being within the budget as indicated in this documentation.
- ✓ The service provider shall from time to time during this contract duration furnish AIDC-EC with a VAT compliant tax invoice accompanied by a copy of the delivery note and upon fulfilment of other obligations stipulated in the contract. Each invoice must be accompanied by a detailed timesheet and expense claim forms substantiating the amount claimed.
- ✓ Payments shall be made promptly by AIDC-EC in Rand, but in no case later than thirty (30) days after submission of a VAT compliant tax invoice and supporting documentation by the service provider if the services have been properly executed as agreed.
- ✓ The service provider shall retain all proof of expenditure and maintain such accounts and records as are reasonable necessary, claimed above, should AIDC-EC require an audit to



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substantiate that expenditure and allows AIDC-EC's own personnel or an independent auditor access to those records.

- ✓ Should the above audit reveal that AIDC-EC has been overcharged, the Service Provider will re-imburse the AIDC-EC the amount overcharged within 30 days inclusive of interest calculated at prime plus 2% per annum;
- ✓ A foreign bidder shall be entirely responsible for all taxes, stamp duties, license fees, and other such levies imposed outside the Republic of South Africa.
- ✓ A local bidder shall be entirely responsible for all taxes, duties, license fees, etc., incurred until delivery of the contracted goods to AIDC-EC.

10. EXTENT OF THE BID

This contract is for the provision of the services as detailed in the attached Specification (page 4-9).

11. CONTRACT TO BE BINDING

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

12. MODE OF THE BID

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

13. QUALITY

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



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14. PERIOD OF VALIDITY FOR BIDS AND WITHDRAWAL OF BID AFTER CLOSING DATE

All bids must remain valid for a period of 90 (ninety) days from the closing date as stipulated in the Bid document.

15. AUTHORITY TO SIGN DOCUMENTS

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

16. DURATION OF THE WORKS: 5 years

17. AGREEMENT

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

18. VALUE ADDED TAX (VAT)

- ✓ **Prices quoted by VAT Vendors MUST be inclusive of VAT** and as such any price charged by the vendor in respect of any taxable supply of goods or services shall for the purposes of the VAT Act Section 64(1) be deemed to include any tax payable in terms of section 7(1) (a) in respect of such supply, whether or not the vendor has included tax in quote/bid price
- ✓ In all instances where bidders (including VAT Vendors) have excluded VAT from the prices quoted , such prices must be evaluated excluding VAT and if the bidder is successful , the letter of award of contract will state that the price at which the contract is awarded is exclusive of VAT and the VAT will not be added on at any stage . **The successful bidder will have to absorb the adverse financial implications of not including VAT in the price quoted.**
- ✓ **Prices quoted by non-VAT Vendors MUST NOT include VAT.** However Non-VAT vendors who submit bids for contracts that would, if successful, take their annual turnover to be above the threshold of R1 million are obliged to include VAT in the prices quoted and must therefore immediately upon award of the contract, register with the South African Revenue Services



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(SARS) as VAT Vendors. **The award of such a contract would be conditional pending the successful Bidder submits proof of registration as a VAT Vendor with SARS.**



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SUPPLIER INFORMATION			
Note: Mandatory Requirement. Failure to complete and Sign this document will result in the bid being non responsive.			
Legal Name of Bidder: (Same as CSD)			
Trading Name of Bidder: (Same as CSD)			
Registration Number (Same as CSD)			
Physical Address			
Postal Address			
Contact Person			
Title/Position in the Firm			
Mobile Number			
Bidder Telephone Number			
Facsimile Number			
Email Address of Contact Person			
Email Address of Bidder			
VAT Registration Number (Same as CSD)			
Central Supplier Database Number	MAAA		
Are the Accredited Representative in		Are you a foreign based supplier for the	<input type="checkbox"/> Yes <input type="checkbox"/> No



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South Africa for the Goods /Services/Works Offered?	<input type="checkbox"/> Yes <input type="checkbox"/> No (If Yes enclose Proof)	Goods/Services/Works Offered?	(If yes, answer the questionnaire Below)
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS			
Is the Entity a resident of the Republic of South Africa (RSA) Does the Entity have a branch in the RSA? Does the Entity have a permanent establishment in the RSA? Does the Entity have any source of income in the RSA			<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No
If the answer is “No” to all of the above, then it is not a requirement to register for a Tax Compliance Status system pin code from the South African Revenue (SARS) and if not register			
<p><u>VERY IMPORTANT</u> <u>Directors/Employees in the Service of State</u></p> <p>Where a person within the Bidding Entity is an Employee of the State, Bidder should</p> <p>a) submit a signed letter on a letter head from their Accounting Officer/Accounting Authority (AO/AA of the Government Institution where they are employed) stating that they are not prohibited from conducting business with the State in terms of Section 8 of the Public Administration Management Act, 2012 (Act No.11 of 2014- “the PFMA”)</p> <p>b) submit a signed letter on a letter from their AO/AA granting permission to perform other remunerative work outside of their employment where the PAMA does not apply to such an employee</p> <p>ECDC reserves the right to verify such information from their AO/AA</p>			



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SERVICE PROVIDER ACKNOWLEDGEMENT OF REQUEST AND TERMS AND CONDITIONS:

I..... (NAME) HEREBY ACCEPT THE TERMS OF THIS
REQUEST FOR BID AND ACKNOWLEDGE

THAT I AM APPROPRIATELY DELEGATED TO RESPOND ON BEHALF OF (ATTACH
DELEGATION OF AUTHORITY)

.....

(NAME OF BIDDER).

Print Name

Date

Designation

Signature



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SBD 3.1: Pricing Schedule

Note: Mandatory Requirement. Failure to complete and Sign this document will result in the bid being non responsive.

Bidders are required to expressly cover their proposed fee/price and disbursement structure based on the activities they propose undertaking to provide the services requested in this call for proposals.

The AIDC-EC reserves the right to negotiate any aspect of the proposed fees/pricing and disbursements with the preferred Bidder and shall not be bound to the fees/pricing and disbursements submitted by any Bidder.

The Bid Fees/Prices must remain valid for a period of 90 days from date of closure of bid.

AIDC-EC reserves the right to request the Bidder's latest audited financial statements in order to ascertain financial stability of the Bidder prior to award of the bid. Failure by the Bidder to provide the latest audited financial statements may invalidate the bid.

Prices will be fixed and firm for the duration of the project.

KINDLY NOTE THAT A FAILURE TO EXPRESSLY COVER THIS IN YOUR PROPOSAL WILL RESULT IN YOU PROPOSAL BEING REJECTED WITHOUT FURTHER CONSIDERATION

Bidders are required to quote as per the specification contained on this document.

The AIDC-EC reserves the right to negotiate any aspect of the proposed fees/pricing and disbursements with the preferred Bidder and shall not be bound to the fees/pricing and disbursements submitted by any Bidder.

The Bid Fees/Prices must remain valid for a period of 90 days from date of closure of bid:

N o	Description/P roject Phases	UNIT	COST PER UNIT (EXCLUDIN G VAT)	Total Amount (Excluding VAT)
	NOT APPLICABLE	NOT APPLICAB LE	NOT APPLICABLE	NOT APPLICAB LE
Sub Total				
SIGNATURE of the DELEGATED AUTHORITY (Attach Delegation of Authority)			DATE	



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SBD 4: BIDDER'S DISCLOSURE

Note: Mandatory Requirement. Failure to complete and sign this document will result in the bid being nonresponsive.

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.

--	--

- 2.1 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 institution	State

2.1 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution?	Yes <input type="checkbox"/> No <input type="checkbox"/>
--	---

- If so, furnish particulars:

2.2 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	Yes <input type="checkbox"/>
---	---------------------------------



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enterprise whether or not they are bidding for this contract?

No

☐

- If so, furnish particulars:

2. 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 consortium¹ will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.5 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.6 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.7 I am aware that, in addition, and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 5 ABOVE IS CORRECT.

¹ 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.



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I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF
PARAGRAPH 6 OF PFMA SCM INSTRUCTION 05 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



SBD 6.1 Preference Point Claim in terms of the Preferential Procurement Regulations 2022

SBD 6.1: Complete in full and sign

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 Principle applicable for this tender /quotation is:

- a) The value of this bid is estimated not to exceed R1 000 000 (all applicable taxes included) and therefore the applicable preference point system for this tender is the **80/20** preference point system.

1.3 Points for this tender shall be awarded for:

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

1.4 The maximum points for this tender are allocated as follows:

Above R50K – R1Mil	
	POINTS
PRICE	80
SPECIFIC GOALS	
Eastern Cape based supplier.	12
51 % and above women owned enterprises.	04
51 % and above youth owned enterprises.	04

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



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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 regarding 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

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

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration



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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

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

Where

P_s = Points scored for price of tender under consideration

P_t = Price of tender under consideration

P_{max} = 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



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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 (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Locality (Enterprises located in the Eastern Cape Province)	12	
>51% Youth Ownership	04	
>51% Women Ownership	04	
Total	20	

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



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[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:

.....

.....

.....



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

1. REFERENCE FOR THE BIDDER

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

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

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



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

OVERALL PERFORMANCE

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

Name of Authorized Person _____

Designation _____

Signature _____

Date _____

Official Stamp



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2. REFERENCE FOR THE BIDDER

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

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

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



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

OVERALL PERFORMANCE

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

Name of Authorized Person _____

Designation _____

Signature _____

Date _____

Official Stamp



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AUTHORITY TO SIGN BID DOCUMENTS

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

Please attach proof to the next page.

ATTACH RESOLUTION OF SIGNATORY



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PROOF OF ADDRESS

ATTACH PROOF OF ADDRESS HERE



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- **ACCREDITATION: CONFIRMATION OF VALID REGISTRATION WITH FINANCIAL SECTOR CONDUCT AUTHORITY (“FSCA”)**

ATTACH ACCREDITATION



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PROOF OF PROFESSIONAL LIABILITY INSURANCE.

ATTACH PROOF HERE



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CSD REPORT

ATTACH CSD



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JOINT VENTURE DISCLOSURE FORM

GENERAL

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

1. JOINT VENTURE PARTICULARS

a) Name

b) Postal address

.....

.....



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c) Physical address.....

.....

.....

d) Telephone.....

e) Fax.....

2. IDENTITY OF EACH NON-AFFIRMABLE JOINT VENTURE PARTNER

2.1(a) Name of Firm

Postal Address

Physical Address.....

Telephone

Fax

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

.....

2.2(a) Name of Firm

Postal Address

Physical Address.....

Telephone

Fax

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

.....

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

IDENTITY OF EACH AFFIRMABLE JOINT VENTURE PARTNER

3.1(a) Name of Firm



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Postal Address

Physical Address

Telephone

Fax

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

.....

3.2(a) Name of Firm

Postal Address

Physical Address

Telephone

Fax

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

.....

3.3(a) Name of Firm

Postal Address

Physical Address

Telephone

Fax

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

.....

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

.....



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5. OWNERSHIP OF THE JOINT VENTURE

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

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

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

(i)

Profit and loss sharing

(ii)

Initial capital contribution in Rands.....

.....

.....

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

(iii)

Anticipated on-going capital contributions in Rands

.....

.....

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

.....

.....



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.....

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

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

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

7. CONTROL AND PARTICIPATION IN THE JOINT VENTURE

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

(a) Joint Venture cheque signing

.....

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



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.....

.....

.....

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

.....

.....

.....

- (d) Acquisition of lines of credit

.....

.....

.....

- (e) Acquisition of performance bonds

.....

.....

.....

- (f) Negotiating and signing labour agreements

.....

.....

.....



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8. MANAGEMENT OF CONTRACT PERFORMANCE

(Fill in the name and firm of the responsible person).

(a) Supervision of field
operations.....

(b) Major
purchasing.....

(c) Estimating
.....

(d) Technical management
.....

9. MANAGEMENT AND CONTROL OF JOINT VENTURE

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

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

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

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



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

MANAGEMENT FUNCTION / DESIGNATION	NAME	PART NER*

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

10. PERSONNEL

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

TRADE/FUNCT ION/ DISCIPLINE	NUMBER EX AFFIRMABL E JOINT VENTURE PARTNERS	NUMBER EX NON- AFFIRMABL E JOINT VENTURE PARTNERS



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

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

- (i) Number currently employed by Affirmable Joint Venture Partners

.....

- (ii) Number currently employed by the Joint Venture

.....

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

.....

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

.....

.....

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

.....

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

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

The undersigned warrants that he/she is duly authorised to sign this Joint Venture Disclosure Form and affirms that the foregoing statements are true and correct and include



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all material information necessary to identify and explain the terms and operations of the Joint Venture and the intended participation of each partner in the undertaking.

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

Signature

Duly authorized to sign on behalf of

Name

Address.....

Telephone.....

Date

Signature

Duly authorized to sign on behalf of

Name

Address.....

Telephone.....

Date



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Signature

Duly authorized to sign on behalf of

Name

Address.....

Telephone.....

Date

Signature

Duly authorized to sign on behalf of

Name



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JOINT VENTURE AGREEMENT

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