## REQUEST FOR PROPOSAL

**APPOINTMENT OF SERVICE PROVIDER FOR PROVISION OF MEDICAL SCHEME AND RETIREMENT EMPLOYMENT BENEFITS PROFESSIONAL SERVICES**

<table>
<thead>
<tr>
<th><strong>BID NUMBER:</strong></th>
<th>NEDLAC 2019/04</th>
</tr>
</thead>
</table>
| **COMPULSORY BRIEFING/CLARIFICATION SESSION:** | **DATE:** 2019 October 11  
**TIME:** 11:00 AM |
| **CLOSING DATE AND TIME:** | 25 October 2019  
**TIME:** 11:00 AM |
| **BID VALIDITY PERIOD** | **90 DAYS (COMMENCING FROM THE RFP CLOSING DATE)** |
| **DESCRIPTION OF SERVICE/GOODS** | **APPOINTMENT OF SERVICE PROVIDER FOR PROVISION OF MEDICAL SCHEME AND RETIREMENT EMPLOYMENT BENEFITS PROFESSIONAL SERVICES** |
| **SUBMISSION OF BID** | **DEPOSITED IN THE TENDER BOX SITUATED AT:**  
Nedlac offices (Reception Area)  
14A Jellicoe Avenue, Rosebank |
| **TECHNICAL ENQUIRY** | **Name:** Philiswa Madlebe  
**Tel no:** 011 328 4200  
**Email:** Philiswa@nedlac.org.za |
| **SUPPLY CHAIN MANAGEMENT ENQUIRY** | **Name:** Joyce Tongwane  
**Tel no:** 011 328 4200  
**Email:** Joyce@nedlac.org.za |
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<th></th>
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<th>Page</th>
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<td>SCM BID DOCUMENT SBD 1</td>
<td>3</td>
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<td>2</td>
<td>FIXED PRICING SCHEDULE</td>
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<td>CERTIFICATE OF INDEPENDENT BID DETERMINATION</td>
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<td>22</td>
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</table>
PART A INVITATION

TO BID
**YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE NEDLAC**

**PROPOSAL NUMBER:** NEDLAC 2019/04  
**CLOSING DATE:** 25 OCTOBER 2019  
**CLOSING TIME:** 11:00 AM

**DESCRIPTION:** APPOINTMENT OF SERVICE PROVIDER TO OFFER MEDICAL SCHEME AND RETIREMENT EMPLOYEE BENEFITS PROFESSIONAL SERVICES

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

14A JELLICOE AVENUE, ROSEBANK, RECEPTION AREA

---

**BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO:**

<table>
<thead>
<tr>
<th>CONTACT PERSON</th>
<th>Joyce Tongwane</th>
<th>CONTACT PERSON</th>
<th>Philiswa Madlebe</th>
</tr>
</thead>
<tbody>
<tr>
<td>TELEPHONE</td>
<td>011 328 4200</td>
<td>TELEPHONE NUMBER</td>
<td>011 328 4200</td>
</tr>
<tr>
<td>FACSIMILE NUMBER</td>
<td></td>
<td>FACSIMILE NUMBER</td>
<td></td>
</tr>
<tr>
<td>E-MAIL ADDRESS</td>
<td><a href="mailto:Joyce@nedlac.org.za">Joyce@nedlac.org.za</a></td>
<td>E-MAIL ADDRESS</td>
<td><a href="mailto:Philiswa@nedlac.o">Philiswa@nedlac.o</a></td>
</tr>
</tbody>
</table>

**SUPPLIER INFORMATION**

<table>
<thead>
<tr>
<th>NAME OF BIDDER</th>
<th>POSTAL ADDRESS</th>
<th>STREET ADDRESS</th>
<th>TELEPHONE NUMBER</th>
<th>CODE</th>
<th>NUMBER</th>
<th>CELLPHONE NUMBER</th>
<th>FACSIMILE NUMBER</th>
<th>CODE</th>
<th>NUMBER</th>
<th>E-MAIL ADDRESS</th>
<th>VAT REGISTRATION NUMBER</th>
</tr>
</thead>
</table>

**SUPPLIER COMPLIANCE STATUS**

<table>
<thead>
<tr>
<th>TAX COMPLIANCE SYSTEM PIN:</th>
<th>OR</th>
<th>CENTRAL SUPPLIER DATABASE No.</th>
<th>MAAA</th>
</tr>
</thead>
<tbody>
<tr>
<td>TICK APPLICABLE BOX</td>
<td></td>
<td>B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE</td>
<td>SWORN AFFIDAVIT</td>
</tr>
<tr>
<td>Yes No</td>
<td></td>
<td>[TICK APPLICABLE BOX]</td>
<td>Yes No</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?</th>
<th>ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS / SERVICES / WORKS OFFERED?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes No</td>
<td>Yes [IF YES, ANSWER PART B:3 ]</td>
</tr>
</tbody>
</table>

**QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS**

- IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? [ ] YES [ ]
- DOES THE ENTITY HAVE A BRANCH IN THE RSA? [ X ] YES [ ] NO
- DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA? [ X ] YES [ ] NO
- DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA? [ X ] YES [ ] NO
- IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? [ X ] 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.**

---

4 | **PAGE** | **SERVICE PROVIDER TO PROVIDE MEDICAL SCHEME AND RETIREMENT EMPLOYEE BENEFITS PROFESSIONAL SERVICES**
PART B
TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:
1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.

1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED—(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.

1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.

1.4. THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).

2. TAX COMPLIANCE REQUIREMENTS

2.1. BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.

2.2. BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER’S PROFILE AND TAX STATUS.

2.3. APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.

2.4. BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.

2.5. IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.

2.6. WHERE NO TCS 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: .................................................................
NAME OF BIDDER: ................................................................. BID NO.: ................................................................. CLOSING TIME 11:00 CLOSING

DATE: .................................................................................................

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

<table>
<thead>
<tr>
<th>ITEM NO</th>
<th>DESCRIPTION</th>
<th>BID PRICE IN RSA CURRENCY **(ALL APPLICABLE TAXES)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>The accompanying information must be used for the formulation of proposals.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td>Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project.</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td>PERSONS WHO WILL BE INVOLVED IN THE PROJECT AND RATES APPLICABLE (CERTIFIED INVOICES MUST BE RENDERED IN TERMS HEREOF)</td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td>PERSON AND POSITION HOURLY RATE DAILY RATE</td>
<td></td>
</tr>
<tr>
<td></td>
<td>........................................................................................................</td>
<td>R-.............</td>
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<td>R-.............</td>
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<tr>
<td></td>
<td>........................................................................................................</td>
<td>R-.............</td>
</tr>
<tr>
<td>5.</td>
<td>PHASES ACCORDING TO WHICH THE PROJECT WILL BECOMPLETED, COST PER PHASE AND MANDAYS TO BE SPENT</td>
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<td></td>
<td>........................................................................................................</td>
<td>R-.............</td>
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<tr>
<td></td>
<td>........................................................................................................</td>
<td>R-.............</td>
</tr>
<tr>
<td>5.1</td>
<td>Travel expenses (specify, for example rate/km and total km, class of air travel, etc). Only actual costs are recoverable. Proof of the expenses incurred must accompany certified invoices.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>DESCRIPTION OF EXPENSE TO BE INCURRED RATE QUANTITY AMOUNT</td>
<td></td>
</tr>
<tr>
<td></td>
<td>........................................................................................................</td>
<td>R-.............</td>
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<td>R-.............</td>
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<tr>
<td></td>
<td>........................................................................................................</td>
<td>R-.............</td>
</tr>
</tbody>
</table>
**"all applicable taxes" includes value-added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies.**

5.2 Other expenses, for example accommodation (specify eg. Three star hotel, bed and breakfast, telephone cost, reproduction cost, etc.). On basis of these particulars, certified invoices will be checked for correctness. Proof of the expenses must accompany invoices.

<table>
<thead>
<tr>
<th>DESCRIPTION OF EXPENSE TO BE INCURRED</th>
<th>RATE</th>
<th>QUANTITY</th>
<th>AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>R……..</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>……..</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>R……..</td>
</tr>
</tbody>
</table>

TOTAL: R………..

6. Period required for commencement with project after acceptance of bid

7. Estimated man-days for completion of project

8. Are the rates quoted firm for the full period of contract? *YES/NO

9. If not firm for the full period, provide details of the basis on which adjustments will be applied for, for example consumer price index.

[DELETE IF NOT APPLICABLE]
DECLARATION OF INTEREST

a. Any legal person, including persons employed by the state¹, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes a price quotation, advertised competitive bid, limited bid or proposal). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where-

- the bidder is employed by the state; and/or
- the legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.

2. In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

a.11 Full Name of bidder or his or her representative:

2.2 IdentityNumber: ……………………………………………………………………………………………………………………………

2.3 Position occupied in the Company (director, trustee, shareholder²): ……………………………

2.4 Company Registration Number: ………………………………………………………………………………………………………

2.5 Tax Reference Number: …………………………………………………………………………………………………………………

2.6 VAT Registration Number: …………………………………………………………………………………………………………………

a.11.1 The names of all directors / trustees / shareholders / members, their individual identity numbers, tax reference numbers and, if applicable, employee / persal numbers must be indicated in paragraph 3 below.

¹“State” means –
(a) any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);
(b) any municipality or municipal entity;
I provincial legislature;
(d) national Assembly or the national Council of provinces; or
I Parliament.

²“Shareholder” means a person who owns shares in the company and is actively involved in the management of the enterprise or business and exercises control over the enterprise.

2.7 Are you or any person connected with the bidder presently employed by the state?  YES / NO

If so, furnish the following particulars:
Name of person / director / trustee / shareholder/ member: ........................................

Name of state institution at which you or the person connected to the bidder is employed: ..........................

Position occupied in the state institution: .............................................................

Any other particulars:
......................................................................................................................
......................................................................................................................
......................................................................................................................

2.7.1 If you are presently employed by the state, did you obtain the appropriate authority to undertake remunerative work outside employment in the public sector?  YES / NO

2.7.2 If yes, did you attached proof of such authority to the bid document?  YES / NO

(Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the bid.

2.7.3 If no, furnish reasons for non-submission of such proof:
......................................................................................................................
......................................................................................................................
......................................................................................................................

2.8 Did you or your spouse, or any of the company's directors / trustees / shareholders / members or their spouses conduct business with the state in the previous twelve months?  YES / NO

2.8.1 If so, furnish particulars:
......................................................................................................................
......................................................................................................................
......................................................................................................................

2.9 Do you, or any person connected with the bidder, have any relationship (family, friend, other) with a person employed by the state and who may be involved with the evaluation and or adjudication of this bid  YES / NO

a.11.1 If so, furnish particulars.
......................................................................................................................
......................................................................................................................
......................................................................................................................

2.10 Are you, or any person connected with the bidder, aware of any relationship (family, friend, other) between any other bidder and any person employed by the state who may be involved with the evaluation and or adjudication of this bid?  YES/NO

2.10.1 If so, furnish particulars.
......................................................................................................................
......................................................................................................................
......................................................................................................................

a.11 Do you or any of the directors / trustees / shareholders / members of the company have any interest in any other related companies whether or not they are bidding for this contract?  YES/NO

2.11.1 If so, furnish particulars:
### FULL DETAILS OF DIRECTORS / TRUSTEES / MEMBERS / SHAREHOLDERS.

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Identity Number</th>
<th>Personal Reference Number</th>
<th>Tax Number</th>
<th>State Number</th>
<th>Employee Number</th>
<th>Persal</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>

#### a DECLARATION

I, THE UNDERSIGNED (NAME)........................................................................................................

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

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 23 OF THE GENERAL CONDITIONS OF CONTRACT SHOULD THIS DECLARATION PROVE TO BE FALSE.

----------------------------------  ----------------------------------
Signature                          Date

----------------------------------  ----------------------------------
Position                           Name of bidder
PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2017

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


1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to all bids:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2

a) The value of this bid is estimated to not exceed R50 000 000 (all applicable taxes included) and therefore the 80/20 preference point system shall be applicable; or

1.3 Points for this bid shall be awarded for:

(a) Price; and
(b) B-BBEE Status Level of Contributor.

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

<table>
<thead>
<tr>
<th>POINTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRICE</td>
</tr>
<tr>
<td>8B-BBEE STATUS LEVEL OF CONTRIBUTOR</td>
</tr>
<tr>
<td>Total points for Price and B-BBEE must not exceed</td>
</tr>
</tbody>
</table>

1.5 Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.

1.6 The purchaser reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the purchaser.

2. DEFINITIONS

(a) “B-BBEE” means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;

(b) “B-BBEE status level of contributor” means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment, issued in terms of section 9(1) of the Broad-
Based Black Economic Empowerment Act;

(c) “bid” means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of goods or services, through price quotations, advertised competitive bidding processes or proposals;

(d) “Broad-Based Black Economic Empowerment Act” means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);

(e) “EME” means an Exempted Micro Enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;

(f) “functionality” means the ability of a tenderer to provide goods or services in accordance with specifications as set out in the tender documents.

(g) “prices” includes all applicable taxes less all unconditional discounts;

(h) “proof of B-BBEE status level of contributor” means:
   1) B-BBEE Status level certificate issued by an authorized body or person;
   2) A sworn affidavit as prescribed by the B-BBEE Codes of Good Practice;
   3) Any other requirement prescribed in terms of the B-BBEE Act;

(i) “QSE” means a qualifying small business enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;

(j) “rand value” means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

3. **POINTS AWARDED FOR PRICE**

3.1 **THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS**

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

<table>
<thead>
<tr>
<th>80/20</th>
<th>90/10</th>
</tr>
</thead>
<tbody>
<tr>
<td>$Ps = \frac{Pt - P_{min}}{P_{min}} \times 80$</td>
<td>$Ps = \frac{Pt - P_{min}}{P_{min}} \times 90$</td>
</tr>
</tbody>
</table>

Where

$Ps$ = Points scored for price of bid under consideration

$Pt$ = Price of bid under consideration

$P_{min}$ = Price of lowest acceptable bid

4. **POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR**

4.1 In terms of Regulation 6 (2) and 7 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:
<table>
<thead>
<tr>
<th>B-BBEE Status Level of Contributor</th>
<th>Number of points (90/10 system)</th>
<th>Number of points (80/20 system)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>10</td>
<td>20</td>
</tr>
<tr>
<td>2</td>
<td>9</td>
<td>18</td>
</tr>
<tr>
<td>3</td>
<td>6</td>
<td>14</td>
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<tr>
<td>4</td>
<td>5</td>
<td>12</td>
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<td>5</td>
<td>4</td>
<td>8</td>
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<td>6</td>
<td>3</td>
<td>6</td>
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<tr>
<td>7</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>8</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Non-compliant contributor</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

5. **BID DECLARATION**

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

6. **B-BBEE STATUS LEVEL OF CONTRIBUTOR CLAIMED IN TERMS OF PARAGRAPHS 1.4 AND 4.1**

6.1 B-BBEE Status Level of Contributor: . = ........(maximum of 10 or 20 points)

(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 4.1 and must be substantiated by relevant proof of B-BBEE status level of contributor.

7. **SUB-CONTRACTING**

7.1 Will any portion of the contract be sub-contracted?

*(Tick applicable box)*

7.1.1 If yes, indicate:

i) What percentage of the contract will be subcontracted.........................% 

ii) The name of the sub-contractor.............................................................. iii) The B-BBEE status level of the sub-contractor........................................

iv) Whether the sub-contractor is an EME or QSE

*(Tick applicable box)*

v) Specify, by ticking the appropriate box, if subcontracting with an enterprise in terms of Preferential Procurement Regulations, 2017:

<table>
<thead>
<tr>
<th>Designated Group: An EME or QSE which is at last 51% owned by:</th>
<th>EME</th>
<th>QSE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Black people</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Black people who are youth</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Black people who are women</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Black people with disabilities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Black people living in rural or underdeveloped areas or townships</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
8. DECLARATION WITH REGARD TO COMPANY/FIRM

8.1 Name of company/firm:........................................................................................................ 8.2

VAT registration number:........................................................................................................ 8.3

Company registration number:............................................................................................... 8.4

8.4 TYPE OF COMPANY/ FIRM

☐ Partnership/Joint Venture / Consortium
☐ One person business/sole propriety
☐ Close corporation
☐ Company
☐ (Pty) Limited

[TICK APPLICABLE BOX]

8.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

.................................................................................................................................................. 8.6

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

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

8.6 COMPANY CLASSIFICATION

☐ Manufacturer
☐ Supplier
☐ Professional service provider
☐ Other service providers, e.g. transporter, etc.

[TICK APPLICABLE BOX]

8.7 Total number of years the company/firm has been in business:................................. 8.8

I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBE status level of contributor indicated in paragraphs 1.4 and 6.1 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I / we 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 6.1, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;

iv) If the B-BBEE status level of contributor has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –
(a) disqualify the person from the bidding 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 bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury from obtaining business from any organ of state for a period not exceeding 10 years, after the *aud i alteram partem* (hear the other side) rule has been applied; and
(e) forward the matter for criminal prosecution.

<table>
<thead>
<tr>
<th>WITNESSES</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>2.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SIGNATURE(S) OF BIDDERS(S)</th>
</tr>
</thead>
<tbody>
<tr>
<td>DATE:</td>
</tr>
<tr>
<td>ADDRESS</td>
</tr>
</tbody>
</table>

|                           |
|                           |
SBD 8

DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

1. This Standard Bidding Document must form part of all bids invited.

2. It serves as a declaration to be used by institutions in ensuring that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system.

3. The bid of any bidder may be disregarded if that bidder, or any of its directors have-
   a. abused the institution’s supply chain management system;
   b. committed fraud or any other improper conduct in relation to such system; or
   c. failed to perform on any previous contract.

4. In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

<table>
<thead>
<tr>
<th>Item</th>
<th>Question</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.1</td>
<td>Is the bidder or any of its directors listed on the National Treasury’s Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector? (Companies or persons who are listed on this Database were informed in writing of this restriction by the Accounting Officer/Authority of the institution that imposed the restriction after the <em>audi alteram partem</em> rule was applied).</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>The Database of Restricted Suppliers now resides on the National Treasury’s website (<a href="http://www.treasury.gov.za">www.treasury.gov.za</a>) and can be accessed by clicking on its link at the bottom of the home page.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.1.1</td>
<td>If so, furnish particulars:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.2</td>
<td>Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)? The Register for Tender Defaulters can be accessed on the National Treasury’s website (<a href="http://www.treasury.gov.za">www.treasury.gov.za</a>) by clicking on its link at the bottom of the home page.</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>4.2.1</td>
<td>If so, furnish particulars:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.3</td>
<td>Was the bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five years?</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>4.3.1</td>
<td>If so, furnish particulars:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
<td></td>
</tr>
<tr>
<td>4.4</td>
<td>Was any contract between the bidder and any organ of state terminated during the past five years on account of failure to perform on or comply with the contract?</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>4.4.1</td>
<td>If so, furnish particulars:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**CERTIFICATION**

I, THE UNDERSIGNED (FULL NAME)………………………………………………………………………

CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM IS TRUE AND CORRECT.

I ACCEPT THAT, IN ADDITION TO CANCELLATION OF A CONTRACT, ACTION MAY BE TAKEN AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.

......................................................... .........................................................
Signature Date

......................................................... .........................................................
Position Name of Bidder
CERTIFICATE OF INDEPENDENT BID DETERMINATION

1 This Standard Bidding Document (SBD) must form part of all bids¹ invited.

2 Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by, firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging).² Collusive bidding is a pe se prohibition meaning that it cannot be justified under any grounds.

3 Treasury Regulation 16A9 prescribes that accounting officers and accounting authorities must take all reasonable steps to prevent abuse of the supply chain management system and authorizes accounting officers and accounting authorities to:

   a. disregard the bid of any bidder if that bidder, or any of its directors have abused the institution's supply chain management system and or committed fraud or any other improper conduct in relation to such system.

   b. cancel a contract awarded to a supplier of goods and services if the supplier committed any corrupt or fraudulent act during the bidding process or the execution of that contract.

4 This SBD serves as a certificate of declaration that would be used by institutions to ensure that, when bids are considered, reasonable steps are taken to prevent any form of bid-rigging.

5 In order to give effect to the above, the attached Certificate of Bid Determination (SBD 9) must be completed and submitted with the bid:

¹ Includes price quotations, advertised competitive bids, limited bids and proposals.

² Bid rigging (or collusive bidding) occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and / or services for purchasers who wish to acquire goods and / or services through a bidding process. Bid rigging is, therefore, an agreement between competitors not to compete.
CERTIFICATE OF INDEPENDENT BID DETERMINATION

I, the undersigned, in submitting the accompanying bid:

______________________________________________________________
(Bid Number and Description)

in response to the invitation for the bid made by:

______________________________________________________________
(Name of Institution)

do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of: ___________________________________________ that:

(Name of Bidder)

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign the bid, on behalf of the bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word “competitor” shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:

   (a) has been requested to submit a bid in response to this bid invitation;
   (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
   (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder.

6. 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 will not be construed as collusive bidding.
7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:

   (a) prices;
   (b) geographical area where product or service will be rendered (market allocation);
   (c) methods, factors or formulas used to calculate prices;
   (d) the intention or decision to submit or not to submit a bid;
(e) the submission of a bid which does not meet the specifications and conditions of the bid; or
(f) bidding with the intention not to win the bid.

8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.

9. 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 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.

10. 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.

.............................................................. ..............................................................
Signature Date

.............................................................. ..............................................................
Position Name of Bidder
CERTIFICATE FOR JOINT VENTURES

This Returnable Schedule is to be completed by EACH member of a joint venture submitting a proposal.

We, the undersigned, are submitting this proposal offer in Joint Venture and hereby authorize

Mr / Ms.......................................................................................................................

Authorized signatory of the Company...........................................................................

Acting in the capacity of lead JV partner, to sign all documents in connection with the proposal offer and any contract resulting from it on our behalf as a joint venture.

NAME OF JV ORGANISATION....................................................................................

ADDRESS:..................................................................................................................

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

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

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

DULY AUTHORIZED SIGNATORY NAME ....................................................................

DESIGNATION:.............................................................................................................

SIGNATURE...................................................................................................................

DATE:.........................................................................................................................
GENERAL CONDITIONS OF CONTRACT

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

TABLE OF CLAUSES

1. Definitions
2. Application
3. General
4. Standards
5. Use of contract documents and information; inspection
6. Patent rights
7. Performance security
8. Inspections, tests and analysis
9. Packing
10. Delivery and documents
11. Insurance
12. Transportation
13. Incidental services
14. Spare parts
15. Warranty
16. Payment
17. Prices
18. Contract amendments
19. Assignment
20. Subcontracts
21. Delays in the supplier’s performance
22. Penalties
23. Termination for default
24. Dumping and countervailing duties
25. Force Majeure
26. Termination for insolvency
General conditions of contract

1 Definitions

The following terms shall be interpreted as indicated:

1.1 “Closing time” means the date and hour specified in the bidding documents for the receipt of Bids.

1.2 “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 organisation purchasing the goods.

1.22 “Republic” means the RSA.

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, SCC are also laid down to cover specific supplies, services or works.

2.1 Where such SCC 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
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:
7.3.1 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
7.3.2 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 organisation 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:
13.1.1 performance or supervision of on-site assembly and/or commissioning of the supplied goods;
13.1.2 furnishing of tools required for assembly and/or maintenance of the supplied goods;
13.1.3 furnishing of a detailed operations and maintenance manual for each appropriate unit of the supplied goods;
13.1.4 performance or supervision of 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
13.1.5 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:
14.1.1 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
14.1.2 in the event of termination of production of the spare parts:
14.1.2.1 advance notification to the purchaser of the pending termination, in sufficient time to permit the purchaser to procure needed requirements; and
14.1.2.2 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

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**SERVICE PROVIDER TO PROVIDE MEDICAL SCHEME AND RETIREMENT EMPLOYEE BENEFITS PROFESSIONAL SERVICES**
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 fulfilment of other obligations stipulated in the contract.

16.3 Payments shall be made promptly by the purchaser, but in no case later than thirty (30) days after submission of an invoice or claim by the 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 authorised 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 contract 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 cancelling 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:

23.1.1 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;
23.1.2 If the Supplier fails to perform any other obligation(s) under the contract; or
23.1.3 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:

23.6.1 the name and address of the supplier and / or person restricted by the purchaser;
23.6.2 the date of commencement of the restriction
23.6.3 the period of restriction; and
23.6.4 the reasons for the restriction.

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

23.8 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,
27.5.1 the parties shall continue to perform their respective obligations under the contract unless they otherwise agree; and
27.5.2 the purchaser shall pay the supplier any monies due the supplier.

28  **Limitation of liability**
28.1 Except in cases of criminal negligence or wilful misconduct, and in the case of infringement pursuant to Clause 6;
28.1.1 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
28.1.2 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 SARSs.

33 **National Industrial Participation (NIP) Programme**
33.1 The NIP Programme administered by the DTI 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.

The above General Conditions of Contract (GCC) are accepted by:

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<thead>
<tr>
<th>Name:</th>
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<tbody>
<tr>
<td>Designation:</td>
</tr>
<tr>
<td>Bidder:</td>
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<tr>
<td>Signature:</td>
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<tr>
<td>Date:</td>
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ANNEXURE A – TERMS OF REFERENCE

Request for Proposals (RFP) for

APPOINTMENT OF A SERVICE PROVIDER TO PROVISION OF MEDICAL SCHEME AND RETIREMENT EMPLOYEE BENEFITS PROFESSIONAL SERVICES

Date of Issue

04 October 2019

34
| Briefing Session | 11 October 2019  
|                 | Time: 11h00  
|                 | Venue: Nedlac House, 14A Jellicoe Avenue, Rosebank |
| Closing Date | 25 October 2019  
|               | Time: 11h00  
| Place | Tender box, Nedlac House, 14A Jellicoe Avenue, Rosebank |
| Enquiries | Supply Chain Management  
|           | Technical information  
|           | E-mail: joyce@nedlac.org.za  
|           | E-mail: Philiswa@nedlac.org.za |
| Nedlac business hours | 08h30 – 17h00 |
| Category | Professional Services |
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1. **INTRODUCTION**

Nedlac is a statutory body that was established through Nedlac Act No. 35 of 1994 and operates under the terms of its own Nedlac Constitution.

Nedlac’s vision is to promote growth, equity and participation through social dialogue. Our Mission is to give effect to Nedlac Act by ensuring effective public participation in labour-market and socio-economic policy and legislation and to facilitate consensus and cooperation between the social partners in dealing with South Africa’s socio-economic challenges.

2. **BACKGROUND**

The purpose of this Request for Proposal (RFP) is to engage with experts who are interested in the supply of medical scheme and retirement employee benefits professional services to Nedlac, as specified herein.

3. **INVITATION FOR PROPOSAL**

Proposals are hereby invited from suitably qualified service providers to offer medical scheme and retirement employee benefits professional services to Nedlac for a period of three (3) years.

4. **PROPOSAL SPECIFICATION**

All proposals are to be submitted in a format specified in this enquiry. However, tenderers are welcome to submit additional / alternative proposals over and above the originally specified format, as defined in the Scope below.

5. **SCOPE OF WORK**

5.1. Nedlac requires advisory services of a medical scheme and retirement employee benefits service provider who will need to provide support to Nedlac by aligning its service offering to Nedlac health care and wellness requirements.

5.2. The medical scheme and retirement employee benefits professional services provider will be required to understand Nedlac business and environment, understand (within legal prescripts) the state of Nedlac employees’ health and wellness and their needs as well as be required to contribute towards developing and implementing the Nedlac employee benefits strategy over the next three years.

5.3. The successful bidder will be expected to conduct risk analyses and health care assessments for interested employees, in order to weigh up the most appropriate medical scheme options, based on the
5.4. The professional service provider will be required to:

   a) Have all accreditations applicable to both the medical aid and retirement employee benefits industries for the provision of such services.
   b) Provide a service to Nedlac employees, advising them of medical scheme options and health plans.
   c) Continuously evaluate the effectiveness and relevance of the Employer selected medical scheme(s).
   d) Schedule monthly meetings with the relevant Nedlac stakeholders to discuss medical scheme matters and advise on ways to enhance service delivery and any current matters/issues.
   e) Monitor the effectiveness and service delivery of the administrative support that is provided to Nedlac by the Medical and Pension Scheme/s through their dedicated Administrator;
   f) Work with the relevant Nedlac stakeholders to formulate, develop and implement an effective Wellness and Medical Scheme and Retirement Employee Strategy.

5.5. The successful bidder will also be expected to advise individual employees on the most appropriate retirement benefit option taking into account their risk profile.

5.6. The medical scheme and retirement employee benefit professional services provider should be able to inform Nedlac's employees timeously of any impending changes to the medical and retirement benefits industry and also advice accordingly.

5.7. The Medical Scheme and Retirement Employee Professional services provider will be required to appoint a dedicated Consultant to Nedlac who will provide integrated advisory services.

5.8. The professional service provider will be required to:

   a) Have all accreditations applicable to both the medical aid and retirement employee benefits industries for the provision of such services.
   b) Provide a service to Nedlac employees, advising them of medical scheme options and health plans.
   c) Continuously evaluate the effectiveness and relevance of the Employer selected medical scheme(s).
   d) Schedule monthly meetings with the relevant Nedlac stakeholders to discuss medical scheme matters and advise on ways to enhance service delivery and any current matters/issues.
   e) Monitor the effectiveness and service delivery of the administrative support that is provided to Nedlac by the Medical and Pension Scheme/s through their dedicated Administrator;
   f) Work with the relevant Nedlac stakeholders to formulate, develop and implement an effective Wellness and Medical Scheme and Retirement Employee Strategy.

5.9. Medical Assessments and Comparisons

   The Medical Scheme and Retirement Employee Professional services provider will provide an annual benchmarking report that consists of a comprehensive analysis of the medical Scheme providers / environment to be used in objective analysis and or assessment of Nedlac's medical scheme providers. The report should consider the following:

   a) Industry trend analysis and updates;
   b) Legislative review and updates;
   c) Solvency and financial status of Nedlac's preferred medical Scheme providers;
   d) Contribution increase expectations;
   e) Scheme comparisons (e.g. value for money);
   f) Benefit offering (membership size and growth);
   g) Risk analysis;
   h) Comparative pricing reports;
i) Membership by scheme;
j) Scheme performance (member size and growth);
k) Low-cost medical scheme options available; modelling of cost impact; and
l) Provide recommendations based on the analysis

5.10. Nedlac Analysis and assessment

The Medical Scheme and Retirement Employee Professional services provider will provide a report consisting of a comprehensive analysis of the value offering to our employees and confirm that our employees are not financially exposed to high costs of medical care. This analysis should consist of:

a) Employee demographics (Age, gender and family size);
b) Employee membership movements;
c) Employee plan selection;
d) Employee and employer contribution and claims analysis;
e) Employee utilisation (contributions vs. claims); and
f) Year on year trend analysis.

5.11. Employee Assistance

The Medical Scheme and Retirement Employee Professional services provider to Nedlac will be required to introduce a number of processes and tools that will assist employees with the selection of most suitable plan options. The Health Care provider will be required to assist with in-house awareness campaigns to inform employees on medical Scheme related matters.

The designated consultant assigned by the Medical Scheme and Retirement Employee Professional services provider to Nedlac should be able to:

a) Analyse an employee’s current situation and be able to provide better benefit options based on their current health profile as an employee’s health care needs may change;
b) Provide efficient and effective communication and education critical to the perception an employee has of the medical scheme;
c) Introduce and improve claims collection and administration delivery structures within Nedlac to ensure prompt receipt by the administrator;
d) Report on and monitor the claims processing efficiencies of the medical scheme administrator with regard to both initial and escalated / problematic claims;
e) Provide weekly / monthly face to face consultations where employees are assisted with;
f) Solving their problematic claims by submitting the query to the medical scheme,
monitoring the progress and provide feedback to the employee;

  g) Be able to analyze an employee’s health history and on this basis be able to recommend the most appropriate medical scheme plan option;

  h) Educate employees on how to utilize their medical scheme more effectively;

  i) The consultant must be able to negotiate on behalf of Nedlac employee if there is a dispute about a specific claim. The Medical Scheme Professional Services Provider will be required to be at Nedlac offices provide face to face sessions with its employees. The frequency of these sessions will be negotiated with the employee benefits office.

5.12. **Assistance to the Nedlac Employee Benefits Committee**

a) Provide support with the management of Service Level Agreements with medical schemes;

b) Provide a dedicated consultant / administrator who will assist the Nedlac Employee benefits team with medical scheme queries;

c) Provide guidance and training to our Human Capital Administrators on the different administrative processes;

d) Provide monthly progress reports on each aspect of administration (e.g. new membership, the addition of dependent, cancellation of membership, membership continuation etc.);

e) Medical Scheme Professional services provider to follow up with employees if required to ensure relevantly requirements are met for resolution of any queries;

f) Present year-end sessions on an annual basis to employees at each of the regional centers;

g) Present medical scheme education at employee orientation sessions;

h) Provide support and advisory service for the incapacity-due-to-ill-health process;

i) Provide guidance and support with employee health care communication strategy and annual year planner linked to hot topics; and

j) Provide support for any on-line system.

5.13. **Employee Wellness Programme**

The Medical Scheme Professional services provider will be required to participate in the design and implementation of Nedlac Wellness Programme and events during the course of the year together with Nedlac appointed EAP service provider. Nedlac welcomes new and industry relevant wellness strategies and will expect the Medical Scheme Professional services provider to keep the organization up to date with trends and peer practices.

5.14. **Other value-adding services**

5.14.1. The professional services provider must demonstrate a thorough understanding of COID Act, and how they will assist Nedlac HR team in the management of this. The
professional services provider should also indicate any costs associated with this service.

5.14.2. The Medical Scheme Professional services provider is welcome to include any ancillary services unique to them that will enhance the overall service offering.

6. PREQUALIFICATION CRITERIA TO ADVANCE CERTAIN GROUPS

6.1. Only service providers having a level 1, 2 or 3 B-BBEE status contributor status will be considered for this tender. Original copies or certified copies of valid B-BBEE Certificates or Sworn Affidavit must be submitted.

6.2. Service providers are required to register on National Treasury’s Central Supplier Database (CSD). Registrations can be completed online at: www.csd.gov.za

6.3. provide Nedlac of their CSD registration number.

6.4. Service providers

6.5. Service providers that fail to meet the pre-qualification criteria will not be considered.

6.6. Proof of accreditation with the applicable Councils and Bodies.

7. FUNCTIONAL EVALUATION CRITERIA

<table>
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<th>No.</th>
<th>Evaluation criteria</th>
<th>Weighted score</th>
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| 1.  | Professional services provider’s experience in providing medical aid and retirement employee benefit services  
The bidder must submit a proposal clearly indicating their knowledge of the industry, applicable legislation and how they have contributed to the industry. | 10             |
| 2.  | References  
Professional services provider’s demonstrated expertise in negotiating medical aid and retirement employee benefits on behalf of clients of similar size as Nedlac. Indication of a number of corporate clients. | 10             |
| 3.  | Infrastructure  
Details of information technology system which the service provider utilizes to provide the above services; including but not limited to portfolio performance tracking on the retirement benefits, medical claims tracking etc. | 10             |
| 4.  | Evidence  
The bidder must provide portfolio of evidence to indicate its ability to that cover the required scope, including but not limited to physical offices, sufficient human resources, going concern of entity over the next three years etc. | 10             |
The evaluation of the functional / technical detail of the proposal will be based on the following criteria:

7.1. Proposals with functionality/technical points of less than the pre-determined minimum overall percentage of 70%.

7.2. Shortlisted bidders will be invited for presentations and shall be notified thereof no later than four (4) days before the actual presentation date.

8. **ELIMINATION CRITERIA**

Proposals will be eliminated under the following conditions:

8.1. Submission after the deadline;

8.2. Failure to meet the pre-qualification criteria;

8.3. Non-Accreditation and registration with the Council for Medical Schemes;

8.4. Non-Registration with the Financial Services Board; and

8.5. Proposals submitted at an incorrect location.
SECTION B – TERMS AND CONDITIONS

9. VENUE FOR PROPOSAL SUBMISSION

All proposals must be submitted at:

Nedlac - Reception Area (in the Tender box) at the following address:
14A Jellicoe Avenue, Rosebank, 2196

10. TENDER PROGRAMME

The tender program, as currently envisaged, incorporates the following key dates:

- Issue of request for proposals: 04 October 2019
- Briefing session: 11 October 2019 at 11h00
- Closing of proposal submissions: 25 October 2019 at 11h00

11. SUBMISSION OF PROPOSALS

11.1. All proposals are to be sealed. No open proposals will be accepted.

11.2. All proposals are to be clearly marked with the RFP number and the name of the tenderer on the outside of the main package.

11.3. 2 copies of proposals are to be submitted.

11.4. Proposals submitted by companies must be signed by a person or persons duly authorised.

11.5. Nedlac will award the contract to qualified tenderer(s) whose proposal is determined to be the most advantageous to Nedlac, taking into consideration the technical (functional) solution and B-BBEE.

12. AWARDING OF TENDERS

12.1. Awarding of tenders will be published on the Government Gazette. No regret letters will be sent out.

13. EVALUATION PROCESS

13.1. Evaluation of proposals

All proposals will be evaluated by an evaluation team for functionality and B-BBEE. Based on the
results of the evaluation process and upon successful negotiations, Nedlac will approve the awarding of the contract to successful tenderers. A two-phase evaluation process will be followed.

13.1.1. The first phase includes evaluation of elimination and functionality criteria.
13.1.2. The second phase includes evaluation of B-BBEE status.
13.1.3. Only proposals that achieved the specified minimum qualification scores for functionality will be evaluated further using the preference points system.

14. VALIDITY PERIOD OF PROPOSAL

Each proposal shall be valid for a minimum period of three (3) months calculated from the closing date.

15. APPOINTMENT OF SERVICE PROVIDER

15.1. The contract will be awarded to the tenderer who scores the highest total number of points during the evaluation process, except where the law permits otherwise.
15.2. Appointment as a successful service provider shall be subject to the parties agreeing to mutually acceptable contractual terms and conditions. In the event of the parties failing to reach such agreement, Nedlac reserves the right to appoint an alternative supplier.

16. ENQUIRIES AND CONTACT WITH THE NEDLAC

Any enquiry regarding this RFP shall be submitted in writing to Nedlac at joyce@nedlac.org.za with the RFP number and “Provision of Medical Scheme and Retirement Employee Professional Services Provider to Nedlac” as the subject.

Any other contact with Nedlac personnel involved in this tender is not permitted during the RFP process other than as required through existing service arrangements or as requested by Nedlac as part of the RFP process.

17. COST OF PROPOSAL

Tenderers are expected to fully acquaint themselves with the conditions, requirements and specifications of this RFP before submitting proposals. Each tenderer assumes all risks for resource commitment and expenses, direct or indirect, of proposal preparation and participation throughout the RFP process. The Nedlac is not responsible directly or indirectly for any costs incurred by tenderers.
18. **CORRECTNESS OF RESPONSES**

18.1. The tenderer must confirm satisfaction regarding the correctness and validity of their proposal and that all prices and rates quoted cover all the work/items specified in the RFP. The prices and rates quoted must cover all obligations under any resulting contract.

18.2. The tenderer accepts that any mistakes regarding prices and calculations will be at their own risk.

19. **VERIFICATION OF DOCUMENTS**

19.1. Tenderers should check the numbers of the pages to satisfy themselves that none are missing or duplicated. No liability will be accepted by Nedlac in regard to anything arising from the fact that pages are missing or duplicated.

19.2. Two hard of each proposal must be submitted. In the event of a contradiction between the submitted copies, the hard copy shall take precedence.

19.3. Pricing schedule and B-BBEE credentials should be submitted with the proposal, but as a separate document and no such information should be available in the technical proposal.

20. **SUB-CONTRACTING**

20.1. A tenderer will not be awarded points for B-BBEE status level if it is indicated in the tender documents that such a tenderer intends sub-contracting more than 25% of the value of the contract to any other enterprise that does not qualify for at least the points that such a tenderer qualifies for, unless the intended sub-contractor is an exempted micro-enterprise that has the capability and ability to execute the sub-contract.

20.2. A tenderer awarded a contract may not sub-contract more than 25% of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level than the person concerned, unless the contract is sub-contracted to an exempted micro-enterprise that has the capability and ability to execute the sub-contract.

21. **ADDITIONAL TERMS AND CONDITIONS**

21.1. A tenderer shall not assume that information and/or documents supplied to Nedlac, at any time prior to this request, are still available to Nedlac, and shall consequently not make any reference to such information document in its response to this request.

21.2. Copies of any affiliations, memberships and/or accreditations that support your submission must be included in the tender.

21.3. In the case of the proposal from a joint venture, the following must be submitted together with the proposal:

21.3.1. Joint venture Agreement including a split of work signed by both parties;

21.3.2. The original or certified copy of the B-BBEE certificate of the joint venture;
21.3.3. The Tax Clearance Certificate of each joint venture member;
21.3.4. Proof of ownership/shareholder certificates/copies; and
21.3.5. Company registration certificates.

21.4. An omission to disclose material information, a factual inaccuracy, and/or misrepresentation of fact may result in the disqualification of a tender, or cancellation of any subsequent contract.

21.5. Failure to comply with any of the terms and conditions as set out in this document will invalidate the Proposal.

22. **NEDLAC RESERVES THE RIGHT TO** -

22.1. Extend the closing date;
22.2. Verify any information contained in a proposal;
22.3. Request documentary proof regarding any tendering issue;
22.4. Appoint one or more service providers, separately or jointly (whether or not they submitted a joint proposal);
22.5. Award this RFP as a whole or in part;
22.6. Cancel or withdraw this RFP as a whole or in part.

23. **DISCLAIMER**

This RFP is a request for proposals only and not an offer document. Answers to this RFP must not be construed as acceptance of an offer or imply the existence of a contract between the parties. By submission of its proposal, tenderers shall be deemed to have satisfied themselves with and to have accepted all Terms & Conditions of this RFP. Nedlac makes no representation, warranty, assurance, guarantee or endorsements to tenderer concerning the RFP, whether with regard to its accuracy, completeness or otherwise and Nedlac shall have no liability towards the tenderer or any other party in connection therewith.