

Warning against tender scams: The WRC urges members of the public to report any suspicious Request for Quotation, Purchase Order or Letter of Award to its Fraud Hotline on 0800 214 777 or email: hotline@kpmg.co.za. If a request or procurement communication appears to be suspicious, suppliers are advised to contact the WRC Supply Chain Management office on 012 761 9300 to verify its authenticity



INVITATION TO BID (SBD1)

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE WATER RESEARCH COMMISSION (WRC)

BID NUMBER:	WRC 002-2025/26	CLOSING DATE:	14 OCTOBER 2025	CLOSING TIME:	11:00 AM
BID VALIDITY	120 DAYS	BID ADVERTISEMENT DATE:	12 SEPTEMBER 2025		
DESCRIPTION OF GOODS/SERVICES	APPOINTMENT OF A SERVICE PROVIDER FOR THE DEVELOPMENT, SUPPORT AND MAINTENANCE OF THE ELECTRONIC DOCUMENT MANAGEMENT SYSTEMS (EDMS) IMPLEMENTATION INCLUDING FILE SERVER MIGRATION TO CLOUD SERVICE				

BID RESPONSE DOCUMENTS PLUS DOCUMENTS SAVED IN A MEMORY STICK (USB) MUST BE DELIVERED TO:

TENDER BOX, WHICH IS SITUATED AT WATER RESEARCH COMMISSION, BLOUKRANS BUILDING, LYNNWOOD BRIDGE OFFICE PARK; SECOND FLOOR.4 DAVENTRY STREET; LYNNWOOD MANOR; PRETORIA.

COMPULSORY BRIEFING SESSION DETAILS:

N/A

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO		TECHNICAL ENQUIRIES MAY BE DIRECTED TO:	
CONTACT PERSON	SCM	CONTACT PERSON	SCM
TELEPHONE NUMBER	012 761 9300	TELEPHONE NUMBER	012 761 9300
E-MAIL ADDRESS	tenders@wrc.org.za	E-MAIL ADDRESS	tenders@wrc.org.za

SUPPLIER INFORMATION

NAME OF BIDDER							
POSTAL ADDRESS							
STREET ADDRESS							
TELEPHONE NUMBER	CODE		NUMBER				
CELLPHONE NUMBER							
E-MAIL ADDRESS							
VAT NUMBER							
SUPPLIER COMPLIANCE STATUS	TAX PIN:		OR	CSD NUMBER:	MAAA		
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] <div><input type="checkbox"/> Yes</div> <div><input type="checkbox"/> No</div>		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		[TICK APPLICABLE BOX] <div><input type="checkbox"/> Yes</div> <div><input type="checkbox"/> No</div>		

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

a) ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]	b) ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS / SERVICES / WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER PART B:3]
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QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS

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

PART B
TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:
<p>1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.</p> <p>1.2. ALL BIDS TOGETHER WITH SAVED DOCUMENTS IN A MEMORY STICK (USB) MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED – (NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.</p> <p>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.</p> <p>1.4. THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).</p>
2. TAX COMPLIANCE REQUIREMENTS
<p>2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.</p> <p>2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.</p> <p>2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.</p> <p>2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.</p> <p>2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.</p> <p>2.6 WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.</p> <p>2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."</p>
3. TOTAL BID PRICE
<p>TOTAL BID PRICE: R..... (Total bid price including VAT and any other applicable taxes and charges) NB: Please note that all prices quoted should be inclusive of Value Added Tax (VAT) and Price Fluctuations (including exchange rates) for the duration of the contract. Where applicable the price should include Supply, Delivery, Maintenance, and any other costs relating to this bid. Furthermore, such prices should be presented in South African Rand (ZAR). Overheads and additional costs will be increased annually according to the latest available CPI rate. The Bid to be valid for 120 days.</p>

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

NAME AND SIGNATURE OF BIDDER.....

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

DATE.....

THE FOLLOWING PARTICULARS TO BE FURNISHED
--

BIDDING STRUCTURE

Indicate the type of Bidding structure by marking with an 'X':	
Individual bidder	
Joint venture	
Consortium	
Subcontractors	
Other	

If individual bidder, indicate the following:	
Name of bidder	
Registration number	
VAT registration number	
Contact person	
Telephone number	
Fax number	
E-mail address	
Postal address	
Physical address	

If Joint Venture or Consortium, indicate the following:	
Name of prime contractor	
Registration number	
VAT registration number	
Contact person	
Telephone number	
Fax number	
E-mail address	
Postal address	
Physical address	

If using sub-contractors:	
Name of prime contractor	
Registration number	
VAT registration number	
Contact person	
Telephone number	
Fax number	
E-mail address	

Postal address	
Physical address	

If Joint Venture or Consortium, indicate the following: <i>(to be completed for each partner)</i>	
Name of partners	
Registration number	
VAT registration number	
Contact person	
Telephone number	
Fax number	
E-mail address	
Postal address	
Physical address	

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

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

SIGNATURE OF BIDDER (duly authorised)

.....

DATE

.....

CAPACITY UNDER WHICH THIS BID IS SIGNED

.....

ANY ENQUIRIES REGARDING THE BIDDING PROCEDURE MAY BE DIRECTED TO:

Department: Supply Chain Management
Contact Person: The SCM Manager
Tel: 012 761 9300
E-mail address: tenders@wrc.org.za

CONDITIONS AND UNDERTAKINGS BY BIDDER

- 1.1 **The Bid forms should not be retyped or redrafted, but photocopies may be prepared and used.** However, only documents with the original signature in black ink shall be accepted. Additional offers against any item should be made on a photocopy of the page in question.
- 1.1.1 Black ink should be used when completing Bid documents.
- 1.1.2 Bidders should check the numbers of the pages to satisfy themselves that none is missing or duplicated. WRC will accept NO liability in regard to anything arising from the fact that pages are missing or duplicated.
- 1.2 I/We hereby Bid to supply all or any of the supplies and/or to procure all or any of the services described in the attached documents to WRC on the terms and conditions and in accordance with the specifications stipulated in the Bid documents (and which shall be taken as part of, and incorporated into, this Bid) at the prices inserted therein.
- 1.3 I/We agree that -
- 1.3.1 The offer herein shall remain binding upon me/us and open for acceptance by WRC during the validity period indicated and calculated from the closing hour and date of the Bid;
- 1.3.2 the laws of the Republic of South Africa shall govern the contract created by the acceptance of my/our Bid and that I/we choose domicilium citandi et executandi in the Republic as indicated below; and
- 1.4 **NB: BIDDERS TERMS AND CONDITIONS ARE NOT ACCEPTABLE.**
- 1.5 I/We furthermore confirm that I/we have satisfied myself/ourselves as to the correctness and validity of my/our Bid that the price(s) and rate(s) quoted cover all the work/item(s) specified in the Bid documents and that the price(s) and rate(s) cover all my/our obligations under a resulting contract and that I/we accept that any mistakes regarding price(s) and calculations will be at my/our risk.
- 1.6 I/We hereby accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me/us under this Bid as the Principal(s) liable for the due fulfilment of this contract.

Signature(s) of Bidder or assignee(s)	Date
Name of signing person (in block letters)	
Capacity	
Are you duly authorized to sign this bid?	
Name of Bidder [company name] (in block letters)	
Postal address (in block letters)	
Domicilium citandi et executandi in the RSA (full street address of this place) (in block letters)	
.....	
.....	
Telephone Number:.....	Fax Number
Cell Number:	Email Address

INSTRUCTIONS TO BIDDER

1 Confidential information disclosure notice

- 1.1 This document may contain confidential information that is the property of Water Research Commission (WRC).
- 1.2 No part of the contents may be used, copied, disclosed or conveyed in whole or in part to any party in any manner whatsoever other than for preparing a proposal in response to this Bid, without prior written permission from WRC.
- 1.3 All copyright and Intellectual Property herein vests with WRC.

2 Introduction

2.1 Purpose

- 2.1.1 The purpose of this Request for Bid (RFB) is an invitation to potential suppliers (hereinafter referred to as "Bidders") to submit Bids for the items/products/solutions as detailed under Annex A: Technical/solution specification.

2.2 Objectives

- 2.2.1 The following objectives must be achieved with the implementation of the above required solution:
 - 2.2.1.1 Based on the Bids submitted and the outcome of the evaluation process according to the set evaluation criteria, WRC intends to select a preferred bidder/s with the view of concluding a service level agreement (SLA) where applicable with such successful bidder. The Bid shall be evaluated in terms of the PPPFA (80/20).

2.3 Queries

- 2.3.1 Should it be necessary for a bidder to obtain clarity on any matter arising from or referred to in this RFB document, please refer queries, in writing, to the contact person(s) listed below. Under no circumstances may any other employee within WRC be approached for any information. Any such action may result to disqualification of a response submitted in response to the RFB. WRC reserves the right to place responses to such queries on the website.

Name	Type of Query	Email address
Supply Chain Management	Bid Queries	tenders@wrc.org.za

Enquiries should reference specific paragraph numbers, where appropriate.

All questions/enquiries must be forwarded in writing not later than **02 October 2025 at 11h00**.

Questions/enquiries received after **11h00 on 02 October 2025 will** not be considered.

Bidders are not allowed to contact any other WRC staff in the context of this tender other than the indicated official under 2.3.1.

2.4 Bid Documents

- 3.1.1 Bids must be **hand delivered or (if couriered) reach and be submitted into the WRC TENDER BOX** by no later than **11h00 on 14 October 2025**. Service provider must ensure that their couriered documents are deposited to the WRC tender box on or before the closing date and time of the bid. WRC will not take responsibility of couriered tender document not found in the tender box on the closing date and time.
- 2.4.1 Bid documents must contain **one original document, initialled on each page, PLUS documents saved in a memory stick (USB). Please do not submit CDs, but rather a memory stick, as our systems/laptops does not have functionality to read CDs.**

General rules and instructions

3.1 Confidentiality

- 3.1.1 The information contained in this document is of a confidential nature and must only be used for purposes of responding to this RFP. This confidentiality clause extends to Bidder partners and/or implementation agents, whom the Bidder may decide to involve in preparing a response to this RFP.
- 3.1.2 For purposes of this process, the term “Confidential Information” shall include all technical and business information, including, without limiting the generality of the foregoing, all secret knowledge and information (including any and all financial, commercial, market, technical, functional and scientific information, and information relating to a party’s strategic objectives and planning and its past, present and future research and development), technical, functional and scientific requirements and specifications, data concerning business relationships, demonstrations, processes, machinery, know-how, architectural information, information contained in a party’s software and associated material and documentation, plans, designs and drawings and all material of whatever description, whether subject to or protected by copyright, patent or trademark, registered or un-registered, or otherwise disclosed or communicated before or after the date of this process.
- 3.1.3 The receiving party shall not, during the period of validity of this process, or at any time thereafter, use or disclose, directly or indirectly, the confidential information of WRC (even if received before the date of this process) to any person whether in the employment of the receiving party or not, who does not take part in the performance of this process.
- 3.1.4 The receiving party shall take all such steps as may be reasonably necessary to prevent WRC’s confidential information coming into the possession of unauthorized third parties. In protecting the receiving party’s confidential information, WRC shall use the same degree of care, which does not amount to less than a reasonable degree of care, to prevent the unauthorized use or disclosure of the confidential information as the receiving party uses to protect its own confidential information.
- 3.1.5 Any documentation, software or records relating to confidential information of WRC, which comes into the possession of the receiving party during the period of validity of this process or at any time thereafter or which has so come into its possession before the period of validity of this process:
- 3.1.5.1 Shall be deemed to form part of the confidential information of WRC;
 - 3.1.5.2 Shall be deemed to be the property of WRC;
 - 3.1.5.3 shall not be copied, reproduced, published, or circulated by the receiving party unless and to the extent that such copying is necessary for the performance of this process and all other processes as contemplated in; and
 - 3.1.5.4 Shall be surrendered to WRC on demand, and in any event on the termination of the investigations and negotiations, and the receiving party shall not retain any extracts.

3.2 News and press releases

- 3.2.1 Bidders or their agents shall not make any news releases concerning this RFP or the awarding of the same or any resulting agreement(s) without the consent of, and then only in co-ordination with WRC.

3.3 Precedence of documents

- 3.3.1 This RFP consists of a number of sections (see list). Where there is a contradiction in terms between the clauses, phrases, words, stipulations, or terms and herein referred to generally as stipulations in this RFP and the stipulations in any other document attached hereto, or the RFP submitted hereto, the relevant stipulations in this RFP shall take precedence.
- 3.3.2 Where this RFP is silent on any matter, the relevant stipulations addressing such matter, and which appears in the PPPFA shall take precedence. Bidders shall refrain from incorporating any additional stipulations in its proposal submitted in terms hereof other than in the form of a clearly marked recommendation that WRC may in its sole discretion elect to import or to ignore. Any such inclusion shall not be used for any purpose of interpretation unless it has been so imported or acknowledged by WRC.
- 3.3.3 It is acknowledged that all stipulations in the PPPFA are not equally applicable to all matters addressed in this RFP. It however remains the exclusive domain and election of WRC as to which of these stipulations are applicable and to what extent. Bidders are hereby acknowledging that the decision of the WRC in this regard is final and binding. The onus to enquire and obtain clarity in this regard rests with the vendor(s). The

vendor(s) shall take care to restrict its enquiries in this regard to the most reasonable interpretations required to ensure the necessary consensus.

3.4 Preferential Procurement Reform

- 3.4.1 WRC supports Black Economic Empowerment as an essential ingredient of its business. In accordance with government policy, WRC insists that the private sector demonstrates its commitment and track record to Black Economic Empowerment in the areas of ownership (shareholding), skills transfer, employment equity and procurement practices (SMME Development) etc.
- 3.4.2 WRC shall apply the principles of the Preferential Procurement Policy Framework Act, (Act No. 5 of 2000) with its Preferential Procurement Regulation 2022 to this proposal.
- 3.4.3 Bidders shall complete the preference certificate attached to this proposal. In the case of a consortium and subcontractors, the preference certificate must be completed for each legal entity (Annex C).

3.5 Security clearances

- 3.5.1 Employees and subcontractors of the Bidders **may** be required to be in possession of valid security clearances to the level determined by NIA or/ WRC commensurate with the nature of the project activities they are involved in. The cost of obtaining suitable clearances is for the account of the bidders. The Bidders shall supply and maintain a list of personnel involved on the project indicating their clearance status.

3.6 Occupational Injuries and Diseases Act 13 of 1993

- 3.6.1 The Bidder warrants that all its employees (including the employees of any sub-contractor that may be appointed) are covered in terms of the Compensation for Occupational Injuries and Diseases Act 13 of 1993 ("COIDA") and that the cover shall remain in force for the duration of the adjudication of this bid and/ or subsequent agreement. WRC reserves the right to request the Bidder to submit documentary proof of the Bidder's registration and "good standing" with the Compensation Fund, or similar proof acceptable to WRC.

3.7 Instructions for submitting a proposal.

- 3.7.1 **One (1) original hard copy plus a memory stick (USB)** with saved submitted tender document with its attachments shall be submitted on the date of closure of the Bid.
 - 3.7.1.1 The original copy must be signed in black ink by an authorised employee, agent or representative of the bidder and each and every page of the proposal shall contain the initials of same signatories.
- 3.7.2 Bidders shall submit proposal responses in accordance with the prescribed manner of submissions as specified above.
- 3.7.3 Bid must be submitted in a prescribed response format herewith reflected as **Response Format** and be sealed in an envelope. The envelope must be marked clearly (on the outside) with the Bid Number and be addressed to **The Supply Chain Management Unit**.
- 3.7.4 Bid must be submitted on or before **14 OCTOBER 2025 NOT LATER THAN 11H00**. The bids must be dropped in the tender box at **the Water Research Commission, Bloukrans Building Lynnwood bridge Office Park; Second floor; reception, 4 Davenry Street; Lynnwood manor; Pretoria**. Bidders are urged to ensure that they clearly mark their bids with the Bid Number; register their bids and sign the register that will be provided at the reception.
- 3.7.5 Failure to sign the register will lead to the bid being disqualified.
- 3.7.6 Failure to submitted sealed bids could result in disqualification of bids. The onus is on the bidder to ensure that their bids get registered in the bids submission register and be deposited in the tender box. NB: **Bidders must advise their courier companies of this instruction**.
- 3.7.7 All Bids in this regard shall only be accepted if they have been registered on the bids received register before or on the closing date and stipulated time.
- 3.7.8 Bids received after the time stipulated shall not be considered.
- 3.7.9 Bid responses sent by courier remains the responsibility of the service provider to ensure that their bid document indeed reached this office (WRC) at least before the closing date/time and that it is registered on the bids submission register and deposited to the tender box. Failure to comply with this requirement shall result in your proposal being treated as a "late proposal" and shall not be entertained. Such proposal shall be returned to the respective Bidders.
- 3.7.10 **No proposal shall be accepted by WRC if submitted in any manner other than as prescribed above.**

4 Reasons for disqualification

- 4.1 WRC reserves the right to disqualify any bidder which does any one or more of the following, and such disqualification may take place without prior notice to the offending bidder, however the bidder shall be notified in writing of such disqualification:
- 4.1.2 Bidders who submitted incomplete information and documentation according to the requirements of this RFP;
- 4.1.3 Bidders who submitted information that is fraudulent, factually untrue or inaccurate, for example memberships that do not exist, BEE credentials, experience, etc.;
- 4.1.4 Bidders who received information not available to other bidders through fraudulent means;
- 4.1.5 Bidders who do not comply with *mandatory requirements* as stipulated in this RFP.
- 4.1.6 Bidders who made false declarations on the Standard Bidding Documents, or misrepresent facts; and/or
- 4.1.7 Bidders who are listed on the National Treasury's database of restricted suppliers

5 Closing of Bid

- 5.1 There shall be no public opening of the Bid received. There shall be no discussions with any enterprise until evaluation of the proposal has been complete. Any subsequent discussions shall be at the discretion of WRC. Unless specifically provided for in the proposal document, bids submitted by means of telegram, telex, facsimile or similar means shall not be considered.
- 5.2 No Bids from any bidder with offices within the RSA shall be accepted if sent via the Internet or e-mail. However, Bids from international bidders with no office or representation in the RSA shall be accepted if received via the Internet or e-mail before the closing date and time.
- 5.2.1 Such Bids shall not be made available for evaluation until the original signed documentation is received within three (3) working days after the closing date, otherwise the proposal shall be disqualified. International bidders must submit proof that they do not have any offices or representation in South Africa.

6 Bid preparation

- 6.1 All additions to the proposal documents i.e. annexes, supporting documentation pamphlets, photographs, technical specifications and other support documentation covering the solution offered etc. shall be neatly bound as part of the schedule concerned.
- 6.2 All responses regarding questions posed in the annexes attached herewith shall be answered in accordance with the prescribed **RFB Response Format**.

7 Oral presentations and briefing sessions

- 7.1 Bidders who submit Bids in response to this RFP may be required to give an oral presentation, which may include, but is not limited to, an equipment/service demonstration of their proposal to WRC. This provides an opportunity for the vendor to clarify or elaborate on the proposal. This is a fact finding and explanation session only and does not include negotiation. WRC shall schedule the time and location of these presentations. Oral presentations are an option of WRC and may or may not be conducted.

8 Evaluation Criteria for Specific Goals

- 8.1 Points awarded for specific goals.
- 8.2 The value of this bid is estimated not to exceed R 50 000 000 (all applicable taxes included) and therefore the 80/20 system shall be applicable.
- 8.3 In terms of Regulation 5 (2) and 6 (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.
- 8.4 Preference points for this bid shall be awarded for:
 - (a) Price; and
 - (b) Specific Goals

Criteria	Weight	Sub-criteria										
Specific Goal	20/100	<p>Specific Goals points will be awarded to bidders according to their size of the firm as follows:</p> <ul style="list-style-type: none">• Businesses owned by youth:<ul style="list-style-type: none">a. 5 points to be awarded to businesses owned by youth. BEE certificate or National Treasury Central Supplier Database Report shall be used to verify the ownership by youth (51% and above ownership %).• B-BBEE Certificate:<ul style="list-style-type: none">a. 15 points to be awarded to bidders based on the BBBEE status level of contributor as indicated in the BBBEE accreditation certification in line with the table below.										
		<table><tr><th>BBBEE LEVELS</th><th>SCORES</th></tr><tr><td>Level 1</td><td>15</td></tr><tr><td>Level 2</td><td>12</td></tr><tr><td>Level 3</td><td>9</td></tr><tr><td>Level 4</td><td>6</td></tr><tr><td>Level 5</td><td>3</td></tr></table>	BBBEE LEVELS	SCORES	Level 1	15	Level 2	12	Level 3	9	Level 4	6
BBBEE LEVELS	SCORES											
Level 1	15											
Level 2	12											
Level 3	9											
Level 4	6											
Level 5	3											

- 8.5 Bidders who qualify as EMEs in terms of the B-BBEE Act must submit a certificate issued by an Accounting Officer as contemplated in the CCA or a Verification Agency accredited by SANAS or a Registered Auditor. Registered auditors do not need to meet the prerequisite for IRBA's approval for the purpose of conducting verification and issuing EMEs with B-BBEE Status Level Certificates.
- 8.6 Bidders other than EMEs must submit their original and valid B-BBEE status level verification certificate or a certified copy thereof, substantiating their B-BBEE rating issued by a Registered Auditor approved by IRBA or a Verification Agency accredited by SANAS.
- 8.7 A trust, consortium or joint venture, will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their B-BBEE status level certificate.
- 8.8 A trust, consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.
- 8.9 Tertiary institutions and public entities will be required to submit their B-BBEE status level certificates in terms of the specialized scorecard contained in the B-BBEE Codes of Good Practice.
- 8.10 A person will not be awarded points for B-BBEE status level if it is indicated in the bid documents that such a bidder 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 bidder qualifies for, unless the intended sub-contractor is an EME that has the capability and ability to execute the sub-contract.
- 8.11 A person 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 EME that has the capability and ability to execute the sub- contract.

9 Evaluation criteria and methodology

9.1 Functional evaluation criteria

“Functionality” means the measurement according to predetermined norms of a service or commodity designed to be practical and useful, working or operating, taking into account quality, reliability, viability and durability of a service or commodity.

The need to invite and evaluate bids on the basis of functionality depends on the nature of the required commodity or service.

When inviting bids, WRC indicates: -

- (i) Whether the bids will be evaluated on functionality;
- (ii) The evaluation criteria for measuring functionality;
- (iii) The weight of each criterion; and
- (iv) The applicable values as well as the minimum threshold for functionality

FUNCTIONAL / TECHNICAL EVALUATION CRITERIA

This bid will be evaluated on Functionality, Price and Specific Goals evaluation will apply.

9.2 PRICE AND SPECIFIC GOALS EVALUATION CRITERIA

Subsequent to the eligibility on screening phase, technical/functional phase and verbal presentation phase, the fourth phase of evaluation of the Bids shall be based on the **80/20** PPPFA principle, price and specific goals points for evaluation criteria are as follows:

Price points	80
Specific goals points	20
Total	100 points

All Bid received shall be evaluated by a panel using the Price and Specific Goals points system as stipulated in the Preferential Procurement Regulations 2022.

10. BIDDING CONDITIONS

10.1 Bidders shall provide full and accurate answers to all (including mandatory) questions posed in this document, and are required to explicitly state either "Comply" or "Not Comply" or "Partial" (with a ☐) regarding compliance with the requirements. Where necessary, the bidder shall substantiate their response to a specific question.

10.2 A “Not Comply” under “Comply” will be interpreted as full compliance/acceptance to the applicable paragraph. A “☐” under “Comply” will be interpreted that the Bidder/s has/have read and understood the paragraph, but the bidder does not accept the content of the applicable paragraph. A “Not Comply” under “Partial” will be interpreted and evaluated objectively against explanations and supporting documentation accordingly.

NOTE: If PARTIAL is indicated as the level of compliance and NO supporting documentation is provided that clearly clarifies the Bidder/s position, the paragraph will be evaluated as “Non-Comply”.

It is mandatory for the bidders to comply with the following bid conditions.

10.3 The following bid conditions will govern the contract between the WRC and the successful bidder:

Requirement	ACCEPT	NOT ACCEPT
10.3.1 Bidders are invited to offer the Services in accordance with the attached Specifications and the conditions within this document.		
10.3.2 The successful Bidder/s will be contracted to procure the Services for a period to be agreed after which WRC reserves the right to review and extend the contract for further period/s at the WRC's discretion.		
10.3.3 The fees will be negotiated.		
Interpretation of requirements	ACCEPT	NOT ACCEPT
10.3.4 The Bidder/s shall accept WRC's interpretation of any specific requirement in the Bid documents or Specifications should there be a difference of interpretation between the Bidder/s and WRC.		
10.3.5 Should any dispute arise as a result of this of this Bid and/or the subsequent contract, which cannot be settled to the mutual satisfaction of the Bidder/s and WRC's, it shall be dealt with in terms of paragraph 3.0 of this document.		
10.3.6 Should there be any discrepancies between the Bid conditions and any other documentation that forms part of this RFP, the Bid conditions shall take preference.		

Documentation	ACCEPT	NOT ACCEPT
10.3.7 Fully comprehensive service documentation shall be supplied in English by each Bidder, which shall explicitly and detail, describe the service/s offered. This documentation shall include sufficient detail to clearly give the reader a precise and unambiguous description of the service/s offered. Incomplete or incomprehensive service documentation will result in rejection of the offer.		
10.3.8 Bidder's name and address should clearly appear on the outside of tender documents and on envelope.		

Selection	ACCEPT	NOT ACCEPT
10.3.9 WRC reserves the right to evaluate and consider any Bids that do not comply strictly to this RFP.		
10.3.10 Acceptance of any Bids will only indicate, without any obligations on the part of either WRC and/or a Bidder, the willingness of such parties to enter into negotiations, which may or may not result in a contract/order as the case may be.		
10.3.11 WRC reserves the right to make a selection solely on the information received in the Bids or to negotiate further with one or more Bidder/s.		
10.3.12 The Bidder/s selected for further negotiations, if any, will be chosen on the basis of the greatest benefit to WRC and not necessarily on the basis of lowest price or any other criteria.		

10.3.13 Should WRC consider it necessary, the Bidder/s shall agree to an inspection of the resources and works of the Bidder, if so required.		
10.3.14 Should WRC consider it necessary, WRC will visit the Bidder/s customer sites.		
10.3.15 WRC reserves the right:		
10.3.15.1 to cancel this RFP at any time;		
10.3.15.2 not to accept any Bids;		
10.3.15.3 to accept one or more Bids for further negotiation and;		
10.3.15.4 To contact any Bidder during the evaluation period, to clarify information only, without informing any other Bidder.		

Copyright	ACCEPT	NOT ACCEPT
10.3.16 The specifications are the intellectual property of WRC.		
10.3.17 The contents of any specifications are the property of WRC and are confidential. It shall not in any manner be reproduced, destroyed, lent or given away without the permission.		

Precedence	ACCEPT	NOT ACCEPT
10.3.18 All details, dimensions and instructions shown on any drawings, diagrams and specifications quoted, shall form part of this bid document.		

10.3.19 If there is any contradictory requirements between the specifications, the drawings referred to and other specifications that have been quoted, the order of precedence, from highest to lowest is: <ul style="list-style-type: none"> • Statutory and mandatory requirements, • This bid document, • Contract Conditions. 		
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Alternative suppliers	ACCEPT	NOT ACCEPT
10.3.20 The Bidder accepts that the WRC will have the right to contract with any other Service Provider for provision of services not covered by this specification.		
10.3.21 Bidder must also submit: A written statement to the specification of WRC by the bidder, that none of his personnel have any involvement or interest in the bidder's business.		

Submission of Bid	ACCEPT	NOT ACCEPT
10.3.22 WRC will also reject an offer if the Bidder/s fail to complete the compliance Certificate/s in the format as described in paragraphs 10.1.1 and 10.1.2.		

Service approval	ACCEPT	NOT ACCEPT
10.3.23 The Procuring of the Services shall not take place until WRC has given final approval of all procedures.		

Additional Criteria	ACCEPT	NOT ACCEPT
10.3.24 WRC will evaluate the bids against the following criteria: <ul style="list-style-type: none"> • Compliance to the Specifications/ Functionality • Price • Economic Empowerment • Compliance to Bid Condition 		

Black Economic Empowerment	ACCEPT	NOT ACCEPT
10.3.25 WRC has established a programme of economic empowerment in our procurement strategies. In this regard, companies are required to indicate their involvement, current and planned, with black businesses and professionals. This will for an important part of the evaluation criteria to be used. WRC reserves the right to request all relevant information, agreements and other documents to verify information supplied in response hereto.		

Addenda	ACCEPT	NOT ACCEPT
10.3.26		

In the event that modifications, clarifications or additions to the RFP become necessary, all Bidders will be notified, in writing, addenda to this RFP.		
Preparation Costs	ACCEPT	NOT ACCEPT
10.3.27 All costs incurred in the preparation, presentation and demonstration of the response shall be for the account of the bidder. All supporting documentation and manuals submitted with RFP will become WRC property unless otherwise stated by the Bidder/s at the time of submission.		
Confidential Material	ACCEPT	NOT ACCEPT
10.3.28 Any material submitted by the Bidder/s, which is considered to be confidential in nature, must be clearly marked as such.		
Payment Terms – Local Creditors	ACCEPT	NOT ACCEPT
10.3.29 Payments of invoices will be effected on by last day of the calendar month following the calendar month of receipt of a correct and original invoice. Invoices/statements should be submitted <u>after</u> WRC has acknowledged receipt of the services procured or goods supplied. A correct and original monthly statement reflected the above invoices must be submitted to WRC by the 5 th of each month.		

Please note that the following clauses of WRC conditions and Procedures governing the Procurement of Services.

10.4 CONTRACT TERMINATION

10.4.1 Contract/s with a successful Bidder/s may be terminated by the WRC on the grounds of valid commercial or

operational requirements that were not foreseen at the time of the Request for Bid being submitted and the contract being entered. The WRC, if it wishes to terminate the contract, shall be required to give 30 (thirty) days written notice of its intention to terminate the contract. Such notice must be preceded by bona fide discussion between the WRC and the successful Bidder. In this instance the WRC shall only remain liable for all amounts due to the successful Bidder with respect to the period ending on the date of the cancellation and shall not be held liable for any damages or losses based on such a termination of the contract.

10.5 DISPUTE RESOLUTION

10.5.1 All disputes arising out of this RFP or relating to the legal validity of this RFP or any part thereof shall be resolved under this paragraph. The parties must refer any dispute to be resolved by:

- Negotiation, in terms of paragraph 10.5.3; failing which
- Mediation, in terms of paragraph 10.5.4; failing which
- Arbitration, in terms of paragraph 10.5.6.

10.5.2 Paragraph Clause 10.5.1 shall not preclude any party from access to an appropriate court of law for interim relief in respect of urgent matters by way of an interdict, or mandamus pending finalisation of the dispute resolution process contemplated in paragraph 10.5.1, for which purpose the parties irrevocably submit to the jurisdiction of a division of the High Court of the Republic of South Africa.

10.5.3 Within ten (10) days of notification, the parties must seek an amicable resolution to the dispute by referring the dispute to designated and authorized representatives of each of the parties to negotiate and resolve the dispute. If an amicable resolution to the dispute is found the authorized representatives of the parties must sign, within the ten (10) day period, an agreement confirming that the dispute has been resolved.

10.5.4 If negotiation in terms of paragraph 10.5.3 fails, the parties must, within fifteen (15) days of the negotiations failing, refer the dispute for resolution by mediation under the rules of the Arbitration Foundation of Southern Africa (or its successor or body nominated in writing by it in its stead).

10.5.5 The periods for negotiation (specified in paragraph 10.5.3) or for referral of the dispute for mediation (specified in paragraph 10.5.4), may be shortened or lengthened by written agreement between the parties.

10.5.6 In the event of the mediation contemplated in paragraph 10.5.4 failing the parties shall refer the dispute, within fifteen (15) days of the mediation failing, for resolution by expedited arbitration under the current rules of the Arbitration Foundation of Southern Africa (or its successor or body nominated in writing by it in its stead).

10.5.7 A single arbitrator shall be appointed by agreement between the parties within ten (10) days of the dispute being referred for arbitration, failing which the arbitrator shall be appointed by the Secretariat of the Arbitration Foundation of Southern Africa (or its successor or body nominated in writing by it in its stead).

10.5.8 At all times, every reasonable effort shall be made to ensure that such arbitrator has the necessary technical skills to enable him to adjudicate the dispute in a satisfactory manner.

10.5.9 The arbitration shall be held at Sandton, South Africa, in English.

10.5.10 The South African law shall apply.

10.5.11 The parties shall be entitled to legal representation.

10.5.12 The award of the arbitrator shall be final and binding on the parties, who hereby agree to give effect to the award. Either party shall be entitled to have the arbitrator's award made an order of court at the cost of the party

requesting same.

10.5.13 This paragraph shall constitute the irrevocable consent of the parties to the dispute resolution proceeding in terms hereof and neither of the parties shall be entitled to withdraw there from or to claim at any arbitration proceedings that they are not bound by the arbitration provisions of this RFP.

- Both parties shall comply with all the provisions of the RFP and with all due diligence during the determination of such dispute should the latter arise during the course of the RFP.

10.6 PAYMENT TERMS - LOCAL CREDITORS

10.6.1 Original, detailed, correct, and complete tax invoices, monthly statements (where applicable), VAT registration numbers (where applicable), verification of bank details (in the format required) and any other relevant supporting documents must be submitted to the Water Research Commission after it has acknowledged receipt in writing of the services procured or goods received, to its satisfaction.

10.6.2 Tax invoices and all necessary supporting documents contemplated in 10.6.1 above must be submitted to the Fund by the 1st (first) business day of a calendar month in order for payment to be effected by the end of the same calendar month. Otherwise, payment shall be effected by the end of the following calendar month. Payments shall furthermore only be made on condition that the required documentation submitted are the originals, correct and complete.

10.6.3 No penalty interest shall be permitted to be charged in the event of the requirements referred to in 10.6.1 and 10.6.2 above not being complied with.

10.6.4 Payment shall be effected by electronic bank transfer or any other method of payment decided to be used by the Fund from time to time and at the Fund's sole discretion.

10.6.5 Payment shall furthermore be subject to the Fund's standard Special Terms and Conditions of Contract, which if applicable shall prevail over this clause in all instances; and a copy whereof shall be furnished upon request.

10.7 TERMINATION

10.7.1 The following clause will be applicable to all contracts entered into/orders placed by WRC:

If, at any time during the currency of this Bid and subsequent contract/order, WRC in its reasonable discretion determines that the other party has, in respect of this bid, contract/order or any other contract/order or agreement to which they were or are parties to:

- Acted dishonestly and/or in bad faith, and/or
- Has made any intentional or negligent misrepresentation to WRC whether in any negotiations preceding the conclusion of, or in the execution of this RFP or any other agreement between the parties,

Then WRC shall be entitled by written notice to the other party forthwith to cancel this contract/order. Upon such cancellation, WRC shall be entitled, in addition to all other remedies available to it, to recover from the other party all damages it has suffered by virtue of such conduct by the other party. Should, at the time of such cancellation, WRC be indebted to the other party for any amounts whatsoever, WRC shall be entitled to withhold payment in respect thereof for a period of 90 (ninety) days from the date of cancellation in order to investigate the party's conduct and any damages suffered by WRC. NO payment by WRC to the other party after the lapse of such period shall preclude WRC thereafter, from recovering from the other party any such damages as it may have suffered.

10.8 SPECIFIC INFORMATION REQUIRED

For ease of reference and evaluating purposes, please furnish replies under the same headings and refer individually to all specific paragraph numbers. Please be clear in your response and use definite answers.

10.9 COPIES REQUIRED

It is a condition that the Bidder/s shall furnish an offer comprising of one original for the supply of products and services enumerated in this Request for Bid Document. The Bidder/s shall ensure that all the relevant information and documentation is submitted with the original as well as the copies. WRC shall not be liable should it become evident that a Bidder/s offer/s is/are not accepted and the reason for such non-acceptance is as a result of the Bidder/s failure to include the information in all copies.

10.10 DUE DILIGENCE

Bidder/s may supply Financial Information.

10.10.1 GENERAL VENDOR INFORMATION

The following general information is required from the prospective vendor:

10.10.2 NAME OF COMPANY/TRADING AS:

- Postal Address
- Street Address
- Telephone and facsimile numbers

10.10.3 COMPANY HEAD OFFICE:

- Postal Address
- Street Address
- Telephone and facsimile numbers
- Contact person
- List of Directors/Partners/affiliated companies with proof of shareholding with this companies/trust
- List of shareholders (**Certified** original copies of individual share certificates/**certified** original copies of Cipro registration document indicating members with percentage interest).
- Date of registration – [if applicable]
- Company registration number. – [if applicable]

10.10.4 Draw or attach the organizational structure of your company:

Ownership structure, i.e. the % shareholding by major investors and controlling interest in affiliated companies.

10.10.5 Basic functional structure, i.e. the administrative section of your company with which WRC will be dealing on a day-to-day basis.

10.10.6 Valid Tax Compliance as verified via Central Supplier Database Compliance History Report – Submit CSD Compliance History Report as obtainable from CSD website – www.csd.gov.za

10.11 INFRASTRUCTURE

- Would you describe your business as international, national or regional?
- List all branches and offices of your company countrywide (Republic of South Africa) together with telephone numbers.

10.12 COMPANY PROFILE – DETAILING ACTIVITIES AND SERVICE OFFERED BY THE COMPANY

10.12.1 Detailed description of main field of expertise/area of operation of company.

10.12.2 Range of services offered.

10.12.3 Reference list of some contracts completed during the last 5 years, including value, duration, location and contact person.

10.12.4 List of current contracts and value thereof. Submit a list of current contracts, contact person and contract numbers. Has any contract with your company ever been cancelled by a client? If YES, provide details.

10.13 **TRAINING CAPABILITIES**

10.13.1 Does your company have any in-house training capabilities? (Infrastructure)

10.13.2 If YES, provide an overview of:

- Activities included in this process (in-house training).
- Method used for evaluating the effectiveness of the in-house training capabilities to ensure the required level of service is maintained.

10.13.3 What training is done by the company?

10.13.4 What type of training is done for you by other companies and who are these companies? (Provide details please)

10.13.5 What type of continuing/supplementary training is done by the company? Give details of subjects, schedules, etc.

10.13.6 Do you have staff in your training department employed on a contract basis? If YES, give details.

10.14 **MANAGEMENT AND SERVICING**

10.14.1 Please supply a full description of how the company is organized together with an organization organogram.

10.14.2 Please indicate a breakdown of staff compliment into management/ supervisors/ administration/ other services (specify).

10.14.3 Please provide details of qualifications and selection process with regards to management/supervisory expertise in the company.

10.14.4 Are all these personnel employed on a full-time basis? If not, provide details.

Annex A: SPECIFICATION / TERMS OF REFERENCE – APPOINTMENT OF A SERVICE PROVIDER FOR THE DEVELOPMENT, SUPPORT AND MAINTENANCE OF THE ELECTRONIC DOCUMENT MANAGEMENT SYSTEMS (EDMS) IMPLEMENTATION INCLUDING FILE SERVER MIGRATION TO CLOUD SERVICE

1. SPECIAL INSTRUCTIONS TO VENDORS

Scope of work shall form part of the contract.

Should a vendor have reasons to believe that the Technical Specification is not open and/or is written for a particular brand or product; the vendor shall notify Procurement Services within seven (07) days after publication of the bid.

Bidders shall provide full and accurate answers to the mandatory questions posed in this document, and, where required explicitly state “Comply/Not Comply” regarding compliance with the requirements. Bidders must substantiate their response to all questions, including full details on how their proposal/solution will address specific functional requirements. All documents as indicated must be supplied as part of the submission.

2. BACKGROUND TO THE PROJECT

The Water Research Commission (WRC) is a national public entity (Schedule 3A) established in terms of the Water Research Act (Act No 34 of 1971). The organization is a dynamic hub for water and sanitation knowledge, innovation and intellectual capital which provides leadership and supports the research, development and innovation of water and sanitation solutions.

The WRC has a new five (5) year strategy with a revised vision, mission and values. The WRC vision is: “To be the premier Water Research Development and Innovation knowledge hub in South Africa and globally”. The mission of the WRC is to:

- Coordinate and promote water research development and innovation to enhance evidence-based decision-making for improved socio-economic conditions and technological developments to:
 - Inform policy and decision-making.
 - Create new products, innovations, and services for socio-economic development;
 - Develop human capital in the water and sanitation science sector;
 - Empower communities and reduce poverty; and
 - Support the national transformation and redress project.

Our values:

- Stakeholder centric
- Integrity
- Professionalism
- Innovation and creativity
- Learning and sharing
- Agility

Aligned to the overall WRC 5-year strategy, is the ICT strategy for digital transformation. This specification outlines the requirements for the implementation of an Electronic (Digital) Document Management System (EDMS) for the Water Research Commission, including the migration of the current on-premises file server to a secure cloud-based solution. The EDMS will serve as a centralized platform for storing, managing, and accessing organisational documents, supporting improved collaboration, compliance, and information governance.

3. SCOPE OF WORK

The WRC is seeking to appoint a service provider with proven experience in SharePoint EDMS design, deployment, and cloud migration to deliver this project, which includes the following scope:

1. Design and development of the system with the following existing requirements documents already drafted by the WRC.

- a. Migration and Integration Requirements
 - b. Infrastructure requirements
 - c. Security and compliance review
 - d. Risk assessment
 - e. User needs assessment
 - f. Document management review.
 - g. Document inventory analysis.
 - h. Functional Requirements Specification
2. Testing and Quality Assurance with the organization
 3. Ongoing Maintenance and Support

The bidder must provide a team of senior, highly experienced experts, and specialists, including developers, programmers, migration specialists and a project manager, to ensure the successful implementation of the SharePoint EDMS. The team should work closely with the ICT team and other business units, offering guidance and recommendations on each component to be developed. The bidder is responsible for the full implementation, testing, support and handover of the new system and services.

3.1 CURRENT STATE

The organisation currently relies on a traditional file server-based document storage system, which presents several limitations in terms of accessibility, security, scalability, and efficient document management. The absence of a centralised Electronic Document Management System (EDMS) has resulted in fragmented storage practices, limited version control, and challenges in maintaining compliance with records management standards. Additionally, the existing infrastructure does not adequately support collaboration, making it difficult to meet evolving organisational and legislative requirements. As such, there is an urgent need to modernise the document management environment through the implementation of a robust, cloud-based EDMS solution. The WRC adopted Microsoft Azure as the cloud-based platform to host applications. WRC also used Microsoft SharePoint for online content management, which is scalable to accommodate future development for digital content management solutions.

The current file structure for the intranet hosted on SharePoint is:

- \Home
- \Organisational structure - Grouped as per department.
- \Strategic Documents - Corporate Plan, Annual Performance Plan,
- \Policies and Procedures - Acts and Legislation
 - Frameworks
 - Processes and Procedures
 - Charters
 - Knowledge Base
 - Policies and Manuals
 - Marketing Documents
- \Wellbeing Documents
 - Benefit information
- \Facilities
 - Health and Safety Documents
- **File Server**

The organization currently utilizes a centralized file server for storing, accessing, and sharing documents across departments. This file server has historically served as the primary repository for operational files, and departmental archives. The SharePoint intranet is not connected on the file server.

• **File Server Configuration**

The organisation makes use of two file servers which have the below configurations

Name	Operating System	Allocated Disk Size	Used Space
FileServer 01	Windows Server 2016	C: 100GB E: 2TB F: 2TB	Total: 3.3TB
FileSever 02	Windows Server 2016	C: 80GB E: 2TB	Total: 2.5TB

Data utilisation is approximately 6TB.

The current Content Management System (CMS) is SharePoint, licensed and running on the existing server platform as SharePoint Online.

3.2 PROJECT SCOPE

The scope of this project includes the end-to-end design, development, implementation, training, support, and maintenance of a cloud-based Electronic Document Management System (EDMS) tailored to the organisation's needs for a period of 3 years. This involves the migration of all existing documents from the current file server to the new EDMS, ensuring proper metadata tagging, version control, and access permissions. The project will also include system configuration, user role setup, workflow automation, and integration with existing IT infrastructure and business applications. Additionally, the service provider will be responsible for developing comprehensive user and administrator training materials, providing technical support during and after implementation, and ensuring compliance with records management policies and applicable regulatory frameworks. The EDMS must be scalable, secure, and accessible, enabling efficient document storage, retrieval, collaboration, and long-term digital preservation.

All work, including artefacts, documents, and any other deliverables produced by the service provider on behalf of the WRC, will be solely owned by the WRC.

3.3 DELIVERABLES

The organisation is seeking a service provider to lead the development, support, and maintenance of an Electronic Document Management System (EDMS), to a secure cloud-based EDMS platform. The service provider will be expected to work closely with the organisation to verify information already collected that assessed current structures, recommended improvements, in order implement a scalable and user-friendly system that ensures secure, efficient access to documents and records. The solution must enable smart indexing, categorisation, search, and retrieval of documents, while maintaining compliance with relevant governance and information management standards.

The key deliverables include:

- A review of WRC needs and approved design
- Development and testing
- Implementation
- Sign offs
- Training and Handover
- Support
- Maintenance

Project final report and closure (including sign off and handover)

- A fully functional and user-friendly EDMS that supports secure cloud storage, access control, and document lifecycle management.
- Successful migration of existing file server data to the new cloud-based EDMS platform with minimal disruption
- Integration with existing systems and alignment with future infrastructure plans
- Comprehensive system documentation including architecture, configuration details, user guides, and technical manuals
- Training for end-users and administrators on EDMS usage, records management, and maintenance procedures
- Ongoing support and maintenance during all project phases, including testing, deployment, and post-implementation.
- Project completion within the agreed timelines and budget
- Full compliance with records management legislation and government ICT regulations

3.4 REQUIREMENTS

Comprehensive project requirement documents will be shared with the appointed service provider. A brief summary of the requirements is provided below. Service providers must consult the below requirements to inform their proposals and ensure alignment with the organisation's objectives and standards.

3.5 FUNCTIONAL REQUIREMENTS

No.	Requirement
FR 1	Document Creator Processes
FR 1.1	Document creators can create new documents directly within the EDMS.
FR 1.2	Document creators can upload existing documents from external sources.
FR 1.3	Metadata tagging is required for all documents, will have the following information: <ul style="list-style-type: none">• Title• Author• document type• Date.
FR 1.4	Draft documents can be edited before submission for review.
FR 1.5	Mandatory fields will have the following information: <ul style="list-style-type: none">• Author• Document type• Date
FR 1.6	System enforces naming conventions; the general formatting is as follows: [Department]_[DocumentType]_[Project/Client/EntityName]_[Date:YYY YMMDD]_[Version]_[Status]
FR 1.7	Documents are submitted to designated reviewers based on predefined workflows.
FR 2	Reviewer Processes
FR 2.1	Reviewers receive notifications when documents are pending review.
FR 2.2	Reviewers can annotate and provide feedback on documents.
FR 2.3	Reviewers can approve or request modifications to submitted documents.
FR 2.4	Review timelines are enforced, with reminders sent for pending reviews.
FR 3	Approver Processes
FR 3.1	Approvers evaluate documents that have passed the initial review stage.
FR 3.2	Approver signs off the document. A record audit trail is kept for all actions.

3.6 INFRASTRUCTURE REQUIREMENTS

WRC requires a cloud based solution, hosted on SharePoint, with the following requirements:

1. SAAS – Software as a Service
2. Meet all local governance requirements
3. Data must be encrypted in transit and at rest
4. Allow for SSO and Entra ID authentication methods.
5. Daily backups, with 5 year retention
6. Role based access control
7. Automation, AI integration
8. Automatic archiving of documents
9. Full audit of changes, updates, etc

No.	Requirement
IFR 1.1	Build on existing (Microsoft 365 E3 Plan) SharePoint Online with advanced document management features, including unlimited cloud storage, robust data protection, and integration with Microsoft Teams and OneDrive.
IFR 1.2	Includes Azure Active Directory integration for secure access and role- based permissions.
IFR 1.3	Provides additional tools like Power Automate for workflow automation, which complements SharePoint's features.
IFR 1.4	Azure's subscription model which allows WRC to scale its services based on usage, making it an ideal platform to support the EDMS.
IFR 1.5	Azure Information Protection Plan 1 or Plan 2 - For document classification and encryption, ensuring compliance with POPIA and other regulatory requirements.
IFR 1.6	Power BI Pro - For advanced reporting and analytics on document usage and workflows.

3.7 INTERGRATION REQUIREMENTS

The EDMS must seamlessly integrate with the organization's existing systems to ensure continuity of business processes and enable efficient document management. This includes interoperability with ERP, HR, email, collaboration platforms, and any other line-of-business applications. The system should support automated workflows, including document routing, approvals, notifications, and reporting, to enhance operational efficiency and ensure accountability. Vendors should detail how their solution supports these integrations and workflow capabilities.

No.	Requirement
User Interface Layer	
INTR 1.1	Provides unified web-based access through multiple platforms.
INTR 1.2	Integrates Microsoft Dynamics 365, Sage 200/300, SharePoint Online, and WRC Intranet
INTR 1.3	WRC Website Integration - Knowledge hub documents which are public facing documents, as well as SCM information – tenders, rfq's etc.
INTR 1.4	Ensures consistent user experience across all platforms.
Business Process Layer	
INTR 1.5	Implements automated workflows
INTR 1.6	Manages document approval processes.
INTR 1.7	Incorporates business process tools for workflow optimisation.
Application Layer	
INTR 1.8	Facilitates integration with core enterprise systems: <ul style="list-style-type: none"> • Dynamics 365 for CRM functionality • Sage Integration for ERP operations • Adobe Acrobat for document handling • Custom APIs for specialised functionality
Physical Data Layer	
INTR 1.9	Utilises Azure Blob Storage for document storage
INTR 1.10	Implements SQL Data Store for structured data management
INTR 1.11	Leverages SharePoint Metadata for document classification
INTR 1.12	Employs Azure Search for advanced content discovery
Integration & MDM Layer	
INTR 1.13	Provides API Gateway for secure service access
INTR 1.14	Implements Integration Services for system interoperability
INTR 1.15	Utilises Logic Apps for workflow automation
INTR 1.16	Manages data aggregation across systems
Enterprise Systems	
INTR 1.17	CRM Management for customer relationship operations
INTR 1.18	ERP Accounting for financial management

INTR 1.19	Document Repository for centralised document storage
INTR 1.20	Email Services for communication integration

3.8 SYSTEM REQUIREMENTS

The following section outlines the key system requirements for the Electronic Document Management System (EDMS)

No.	Requirement
User Interface Layer	
Integration Capability	
SR 1.1	The system must support integration with existing storage platforms (e.g., OneDrive, network drives) to enable a centralised repository and unified view of all organisational documents.
Standardised Document Workflows	
SR 1.2	The system must provide configurable, automated document workflows to ensure consistency in approvals, reviews, and collaboration, including version control capabilities.
Regulatory Compliance Support	
SR 1.3	The system must include features that support compliance with applicable legislation, including the Protection of Personal Information Act (POPIA) and the National Archives Act, particularly around document retention and access control.
Role-Based Access Control (RBAC)	
SR 1.4	The system must enforce granular, role-based access controls to prevent unauthorised access and ensure that only authorised users can view or modify documents relevant to their roles.
Enhanced Search Functionality	
SR 1.5	The system must support advanced search features, including metadata tagging, filters, and keyword search, to enable efficient and accurate document retrieval.

3.9 USER NEEDS REQUIREMENTS

This section outlines the user requirements for the Electronic Document Management System (EDMS). It defines the specific capabilities and features that end-users need to perform their tasks efficiently, securely, and in alignment with organisational processes. These requirements ensure that the system is intuitive, accessible, and supports effective document management and collaboration.

No.	Requirement
User Interface Layer	
Real-Time Collaboration	
	Support multiple users editing the same document simultaneously with live updates.
	Tools for commenting and annotating documents for collaborative feedback.
Centralized Document Storage	
	Ability to store, retrieve, and manage documents from a unified, central repository.
	Support for organizing documents using standardized folder structures and naming conventions.
Version Control and Tracking	
	Maintain document version history and provide tools to track changes
	Ability to restore previous versions of documents as needed
Access Control and Permissions Management	
	Role-based access control to assign different permission levels for different user roles.
	Secure sharing options for both internal and external users.
Audit Trails and Compliance Features	
	Built-in audit logs to track who accessed or modified a document and when.
	Tools for generating compliance reports to adhere to regulatory standards.
	Access to custom built audit logs/trails required to produce Audit Reports per week, month, yearly, in case of any incidents.

Document Retention and Lifecycle Management	
	Automated notifications and workflows for document archiving and deletion based on retention policies.
	Configurable retention schedules by document type.
	Functionality to access archived records shall be provided on EDMS.
Search and Retrieval Capabilities	
	Advanced search functionality to locate documents based on metadata, content, or tags.
	Filters for narrowing down search results by department, document type, or date.
Mobile Accessibility	
	Mobile-friendly interface to allow document access, editing, and collaboration from smartphones or tablets.
Integration with Existing Systems	
	Capability to integrate with CRM, ERP, and other enterprise systems for seamless workflow management.

3.10 SECURITY AND COMPLIANCE

- **Governance and policy review**
 - Develop clear governance policies to manage the transition from a manual folder- based system to SharePoint Online.
 - Define and document roles and responsibilities for EDMS governance and security.
 - Establish SLAs and NDAs with third-party vendors to ensure clear accountability and secure data handling.
 - Standardise document naming conventions and folder.
- **Identity Access Management**
 - Replace current folder-based permissions with Role-Based Access Control (RBAC) in SharePoint Online to ensure scalability and more granular access management.
 - Enforce session timeout policies to automatically log out inactive sessions.
 - Regularly monitor privileged accounts to detect and prevent misuse.
 - Create separate access policies for external users, enforcing the principle of least privilege.
- **Data Protection and Privacy**
 - Develop a comprehensive data privacy policy aligned with POPIA to outline the organisation's approach to data handling, storage, and protection.
 - Ensure data is encrypted.
 - Implement workflows for managing data subject requests in compliance with POPIA.
 - Conduct periodic data privacy impact assessments (DPIAs) for EDMS operations.
- **Logging and Monitoring**
 - Reports on all user activities (e.g., logins, document uploads/downloads, and sharing actions)
 - Secure logs using tamper-proof storage solutions and ability to retrieve reports.
 - Establish clear incident response timelines and escalation protocols.
 - Centralise log management with a Security Information and Event Management (SIEM) system.
 - Implement basic real-time alerts for suspicious behaviours, such as failed login attempts or bulk downloads, and a system-generated report for all alerts may be provided daily. Access to logs and monitoring reports as and when needed shall be available on the system.

3.11 RISK ASSESSMENT

- Implement clustering for high availability to the existing disaster recovery site - This will minimise downtime risks by ensuring that the EDMS remains accessible even in the event of hardware failure or maintenance needs.
- Plan and execute a phased integration approach - Conduct thorough compatibility testing between the EDMS and existing systems (e.g., SAGE, Microsoft Dynamics) to ensure data consistency and prevent disruptions. Collaborate closely with vendors and IT teams to establish API connections, enable data synchronisation, and address any technical challenges early in the integration process.
- Automate document workflows - Reducing manual handling will decrease the likelihood of errors and improve control over document sharing, ensuring that sensitive information remains within the organisation's control.

- Establish ongoing compliance monitoring with quarterly audits - Regular compliance checks will ensure that the EDMS consistently meets regulatory requirements and supports WRC's data protection obligations.
- Train users on EDMS functionalities - Emphasising the benefits of adopting new workflows will help mitigate resistance to change, increase user confidence, and support a smooth transition to the EDMS.

3.12 TRAINING AND HANDOVER

1. The service provider is expected to develop a training and handover plan for approval to the ICT and Communications teams.
2. The service provider is expected to implement training and handover ensure smooth transition between WRC, support, and maintenance activities.

3.13 PROJECT MANAGEMENT

The project manager must provide regular updates on following areas:

1. Project Plan
2. Timeline and milestones achieved.
3. Project Methodology to be adopted
4. Risk Management
5. Quality Assurance
6. Project reports must be reviewed and approved by the project steering committee.

3.14 MAINTENANCE AND SUPPORT REQUIREMENTS

1. System Updates and Enhancements

- Regular updates to the EDMS software, modules, and integrations, plugin updates (where applicable)
- Applying patches to address security vulnerabilities or system bugs
- Testing updates in a staging environment before deployment to production
- Continuous improvement based on user feedback and evolving business needs.

2. Security and Data Protection

- Implementation of strong access controls and authentication protocols
- Regular security scans and vulnerability assessments
- Proactive patching and mitigation of security risks
- Daily or scheduled backups of all documents and system configurations
- Quick recovery and restoration processes in case of data loss or system failure
- Compliance with data protection legislation and records management policies

3. System Performance and Monitoring

- Monitoring system performance, storage capacity, and uptime
- Optimising system response times for document retrieval and upload
- Identifying and resolving any latency or access issues
- Ensuring high availability of the EDMS for end-users

4. Technical and User Support

- Helpdesk or support services for troubleshooting technical issues.
- Assistance with user access, permissions, and workflow-related queries
- Resolving system errors, document upload/download issues, and integration problems
- Support for administrators and records management personnel

5. Reporting and Analytics

- Regular system usage and performance reports
- Audit logs and user activity tracking for compliance and governance.
- Insights into storage usage and document lifecycle trends
- Recommendations for system optimisation based on analytics.

6. Cloud Hosting and Service Management

- Management of cloud hosting environment, including service availability and resource allocation
- Oversight of data residency and compliance with cloud provider terms
- Management of SSL certificates, domain configuration (if applicable), and DNS settings
- Renewals and scalability planning for cloud resources

4. PERIOD / DURATION OF PROJECT / ASSIGNMENT

The project must be completed within the following period:

- System development to be completed within a period of six (6) months from date of appointment.
- Training to be completed at least two weeks before the EDMS Go-Live.
- Support and maintenance to commence from the date the project development is completed and run for a period of thirty-six (36) months.

5. THE SPECIFIC GOALS ALLOCATED POINTS IN TERMS OF THIS TENDER - B-BBEE STATUS LEVEL OF CONTRIBUTOR

80/20 points system shall be applied for this project in line with applied Preferential Procurement Regulations 2022.

6. EVALUATION CRITERIA

The bid will be evaluated in accordance with the PPPFMA as follows:

6.1 Phase 1: Compliance to minimum requirements - bidders are requested to submit the information as listed under phase 1 for admin and verification for compliance purposes.

6.2.1 Phase 2 – Stage 1: Functional evaluation phase as listed in 6.2.1 below – Only bidders that fully complied with the minimum set threshold of 80% in this phase shall progress to the next phase of evaluation. Failure to fully meet the set requirements will be eliminated.

6.2.2 Phase 2 – Stage 2: Verbal presentation evaluation phase as listed in 6.2.2 below – Only bidders that fully complied with the minimum set threshold of 80% in this phase shall progress to the next phase of evaluation. Failure to fully meet the set requirements will be eliminated.

6.3 Phase 3: Specification compliance evaluation – Quotations will be evaluated against the specification to ascertain compliance. Only bidders who complied with the specification/scope of work will proceed to the next phase of evaluation.

6.4 Phase 4: Pricing and Specific Goals – Only bidders that progressed from the above phase 2 will be eligible for further evaluation under this phase. Bidder who obtains the highest points shall be recommended for award.

6.1 SCREENING OF MINIMUM REQUIREMENT CRITERIA

In this phase all bids received will be verified for compliance and completeness of the submitted proposal. No bidders shall be eliminated under this phase, as the requested information is for administrative purposes. Where clarity or further information is needed, the WRC reserves the right to request such information for clarity purposes and compliance verification purposes.

- Bid forms must be properly received on the bid closing date and time specified on the invitation, fully completed, dated, and signed in ink. Late bids will not be accepted for consideration.
- Bid forms must be properly fully completed, dated, signed in ink, and initial every page of the bid.
- Submission of the bid document must be bonded and is without tearing any pages off.
- Invitation to Bid (SBD 1) must be fully completed,
- Submission of a Supplier SARS Tax Compliance Status Verification PIN to enable Water Research Commission to verify Tax Compliance status on SARS eFiling. NB: Bidders whom their Tax matters are not in order will not be considered for this bid.
- Submission of fully completed Pricing Schedule
- Submission of fully completed SBD 4 (Declaration of Interest),
- Submission of fully completed SBD 6.1 (Preference Claim Certificate),
- Submission of the original or certified B-BBEE Status Level Verification Certificate or original B-BBEE Sworn Affidavit in case of EME and QSE)
- Business Registration Certificate e.g. CK 1, certificate of incorporation
- Familiarise yourself and initial every page of the General Condition of Contract
- Submission of Central Supplier Database (CSD) Compliance History Report.

6.2.1 PHASE TWO (2) – STAGE 1: FUNCTIONAL EVALUATION PHASE

Only bidders that fully complied with the minimum set threshold of 80% in this phase shall progress to the next phase of evaluation. Failure to fully meet the set requirements will be eliminated.

Table 1: FUNCTIONALITY EVALUATION CRITERIA

FUNCTIONALITY	REQUIREMENT	SCORE
Part A:		
1. Experience of the Firm in similar assignments (100 points)		
1.1. Company profile and experience	<p>Brief company profile and detailing projects and years of experience in development, implementation, maintenance, and support of an EDMS system.</p> <p>Scoring Criteria:</p> <ul style="list-style-type: none"> • Company profile detailing 5 relevant projects completed in the past specifically in respect of EDMS development, implementation, maintenance, and support in corporate or public sector organizations. > 10 years of relevant experience = 25 points • Company profile detailing 4 relevant projects completed in the past specifically in respect of EDMS development, implementation, maintenance, and support in corporate or public sector organizations. >8 years of relevant experience = 20 points • Company profile detailing 3 relevant projects completed in the past specifically in respect of EDMS development, implementation, maintenance, and support in corporate or public sector organizations. >6 years of relevant experience = 15 points • Company profile detailing 2 relevant projects completed in specifically in respect of EDMS development, implementation, maintenance, and support in corporate or public sector organizations. >4 years of relevant experience = 10 points • Company profile detailing 1 relevant project completed in the past specifically in respect of EDMS development, implementation, maintenance, and support in corporate or public sector organizations. >2 years of relevant experience = 5 points • No company profile detailing relevant projects completed in the past specifically in respect of EDMS development, implementation, maintenance, and support in corporate or public sector organizations has been attached = 0 point 	25
1.2. Reference Letters	<p>Service provider to submit positive contactable signed reference letters where project for EDMS development, implementation, maintenance, and support was done.</p> <p>Scoring Criteria:</p> <ul style="list-style-type: none"> • 5 reference letters in successful execution of projects in EDMS development, implementation, maintenance, and support = 10 points • 4 reference letters in successful execution of projects in EDMS development, implementation, maintenance, and support = 8 points • 3 reference letters in successful execution of a project in EDMS development, implementation, maintenance, and support = 6 points • 2 reference letters in successful execution of projects in EDMS development, implementation, maintenance, and support = 4 points • 1 reference letter in successful execution of a project in EDMS development, implementation, maintenance, and support = 2 points • No reference letter in successful execution of a project in EDMS development, implementation, maintenance, and support = 0 point <p>(Proof: Reference letter on client letterhead with contact details of the client)</p>	10

<p>1.3. Team education and experience – Bidders to submit CVs and copies of qualification certificates of the listed proposed team for evaluation purposes.</p>	<p>1. Project Manager = TOTAL POINTS 4</p> <ul style="list-style-type: none"> • 2 Points = Experience: 5–10+ years in project management, preferably with ICT or ECM/EDMS projects. • 2 Points = Qualifications: PMP, PRINCE2, or Agile certification; Bachelor's degree in IT, Business, or related. • For Noting = Skills: Stakeholder engagement, budgeting, risk management, reporting. <p>2. Business Analyst = TOTAL POINTS 4</p> <ul style="list-style-type: none"> • 2 Points = Experience: 5–8 years in business analysis with exposure to digital transformation or content management systems. • 2 Points = Qualifications: BSc/BA in IT, Business, or related field; CBAP or similar IIBA certification preferred. • For Noting = Skills: Requirements gathering, process mapping, stakeholder facilitation. <p>3. Solution Architect= TOTAL POINTS 4</p> <ul style="list-style-type: none"> • 2 Points = Experience: 8+ years in IT architecture or enterprise solutions; experience with system integrations. • 2 Points = Qualifications: Bachelor's or Master's in Computer Science or IT; TOGAF certification a plus. • For Noting = Skills: System design, integration patterns, security, cloud/on-premises architectures. <p>4. EDMS Product Specialist / Functional Consultant= TOTAL POINTS 4</p> <ul style="list-style-type: none"> • 2 Points = Experience: 5–7 years working with the selected EDMS platform (SharePoint). • 2 Points = Qualifications: Vendor certifications (e.g., OpenText Certified Consultant); Bachelor's in IT or Library Science. • For Noting = Skills: Configuration, workflow design, taxonomy, end-user enablement. <p>5. Developers / Technical Consultants= TOTAL POINTS 4</p> <ul style="list-style-type: none"> • 2 Points = Experience: 3–6+ years in software development, preferably with EDMS platforms and API integrations. • 2 Points = Qualifications: Bachelor's in Computer Science or equivalent; platform-specific dev certifications (e.g., Microsoft 365 Dev, OpenText xECM). • For Noting = Skills: Coding (e.g., JavaScript, C#, .NET), scripting, integration, debugging. <p>6. System Administrator= TOTAL POINTS 4</p> <ul style="list-style-type: none"> • 2 Points = Experience: 4–6 years in server/network/cloud admin roles, ideally supporting enterprise content systems. • 2 Points = Qualifications: Bachelor's in IT; certifications like MCSA, Azure Administrator, or equivalent. • For Noting = Skills: Permissions management, system monitoring, backups, DR, patching. <p>7. Change Management & Training Lead= TOTAL POINTS 4</p> <ul style="list-style-type: none"> • 2 Points = Experience: 5–8 years in change enablement, especially around digital tools. • 2 Points = Qualifications : PROSCI/Change Management certifications • For Noting = Skills: Communication planning, training rollout, stakeholder engagement. 	<p style="text-align: center;">45</p>
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	<p>8. Quality Assurance (QA) / Tester= TOTAL POINTS 4</p> <ul style="list-style-type: none"> • 2 Points = Experience: 3–5 years in QA/testing, ideally in enterprise software or document systems. • 2 Points = Qualifications: Bachelor's in IT or related. • For Noting = Skills: Test planning, defect management, UAT facilitation, automation tools (optional). <p>9. Support Team / Helpdesk= TOTAL POINTS 4</p> <ul style="list-style-type: none"> • 2 Points = Experience: 2–4 years in user support or application support. • 2 Points = Qualifications: ITIL Foundation; Diploma or Bachelor's in IT. • For Noting = Skills: Troubleshooting, ticketing systems, user training. <p>10. Records Management Expert= TOTAL POINTS 5</p> <ul style="list-style-type: none"> • 3 Points = Experience: 5–7 years in records or information governance. • 2 Points = Qualifications: Degree in Records Management, Archival Science, or Law; AIIM or IRMS certification. • For Noting = Skills: Retention schedules, compliance, classification schemes. <p>11. Cybersecurity Specialist = TOTAL POINTS 4</p> <ul style="list-style-type: none"> • 2 Points = Experience: 5–10 years in security roles, with exposure to ECM/EDMS environments. • 2 Points = Qualifications: CISSP, CISM, or CompTIA Security+; Bachelor's in IT or Cybersecurity. <p>For Noting = Skills: Security audits, encryption, access controls, vulnerability assessments.</p>	
Project plan and methodology	<p>Project plan</p> <p>Scoring Criteria:</p> <ul style="list-style-type: none"> • 20 Points = Project plan fully meets expectations or covers all deliverables of the project (this refers to the entire scope of work and all key activities of the scope of work). It fully outlines a detailed, clear, and realistic methodology on how the deliverables will be achieved. There is an indication of valid data collection tools, and a clear, realistic, and detailed project plan with realistic timeframes outlining all key project phases such as project planning, implementation, project monitoring and closure. • 15 Points = Project plan should meet expectations or covers 75% of aspects and deliverables of the project (this refers to the entire scope of work and all key activities of the scope of work). Its satisfactory outline a clear and realistic methodology on how the deliverables will be achieved. There is an indication of valid data collection tools, and a clear, realistic, and detailed project plan with realistic timeframes outlining some of the key project phases such as project planning, implementation, project monitoring and closure. • 10 Points = Project plan partially meets expectations or covers 50% of aspects and deliverables of the project (this refers the entire scope of work and all key activities of the scope of work). It partially outlines a clear and realistic methodology on how the deliverables will be achieved. There is an indication of valid data collection tools, and a clear, realistic, and detailed project plan with realistic timeframes outlining some of the key project phases such as project planning, implementation, project monitoring and closure. 	20

	<ul style="list-style-type: none"> • 0 Points = Project plan does not meet expectations or cover all aspects and deliverables of the project. It is insufficient and does not clearly outline a clear and realistic methodology on how the deliverables will be achieved. There is no indication of valid data collection tools, and no clear, realistic, and detailed project plan with realistic timeframes outlining key project phases such as project planning, implementation, project monitoring and closure. 	
	TOTAL	100 points
	Minimum threshold	80%
Bidders who score 80% or more in this Phase will be considered for the next phase.		

Minimum Qualification Threshold: Service providers are expected to meet a minimum 80% threshold on the above technical requirements. Only service provider/s who met the set minimum threshold on the technical evaluation phase will progress to the next phase of evaluation. Suppliers who fail to meet the set minimum threshold shall be considered non-responsive and shall be eliminated on technical evaluation.

6.2.2 PHASE 2 – STAGE 2: VERBAL PRESENTATION FOR EDMS APPLICATION

The service provider to note that:

- A maximum of 30 minutes per bidder will be allowed for the presentation, on the details of minimum topics/components as provided.
- A presentation considered to be unsuitable shall be rejected if it does not respond to important aspects of the verbal presentation.
- A data projector will be made available
- The evaluation of the presentation will be on the basis of applying the evaluation criteria and point system indicated below.

VERBAL PRESENTATION CRITERIA:

FUNCTIONALITY CRITERIA	WEIGHTING FACTORS	COMPONENTS TO BE PRESENTED ON	POINTS ALLOCATION
Presentation of previously deployed EDMS application	100	Bidders will be expected to present their previously deployed EDMS application (previously built or will build) – clear and detailed demonstration:	<p>Demonstration of real-life scenarios (previously built or will build) a total point of 100 can be achieved as per the below structure:</p> <p>Understanding of Requirements (30 points)</p> <ul style="list-style-type: none"> • 15 Points = Does the demo directly address your business requirements/specification? • 15 Points = Are the scenarios relevant to your actual use cases (document creation, storage, retrieval, workflow, approvals, security, etc.)? <p>System Functionality & Features (40 points)</p> <ul style="list-style-type: none"> • 10 Points = Does the EDMS demonstrate core functions (document upload, indexing, version control, search, access rights)? • 10 Points = Are workflow and approvals shown clearly (routing, notifications, audit trails)? • 10 Points = Does the demo show integration capability with existing systems (e.g., email, ERP, HR, etc.)? • 10 Points = Can the system handle compliance (records management, retention policies)? <p>Ease of Use / User Experience (30 points)</p> <ul style="list-style-type: none"> • 10 Points = Is the interface intuitive and easy to navigate for end-users? • 10 Points = Is the search function fast and accurate? • 10 Points = Can different user roles (admin vs normal user) be easily understood in the demo?

Qualification Criteria:

Bidders who achieved 80% of the 100 points from Presentation phase two (2) Stage two (2) will progress to phase three (3).

Bidders who do not achieve the set minimum threshold from Presentation Phase will be eliminated and not progress to the next phase.

6.3 PHASE THREE (3): SPECIFICATION COMPLIANCE EVALUATION

Quotations will be evaluated against the specification to ascertain compliance. Only bidders who complied with the specification/scope of work will proceed to the next phase of evaluation.

Very Important: The submitted quotation of the supplier must list all items quoted for the Water Research Commission to verify if all items as listed as per the scope of work. Failure to submit a quotation which clearly indicate all items quoted and where not all items have been quoted will result in elimination of the supplier's quotation.

6.4 PHASE FOUR (4): PRICE AND PREFERENCE (SPECIFIC GOAL) EVALUATION PHASE

Service Providers who comply with set minimum threshold and specification compliance will be evaluated under Price and Specific goal phase to determine the highest scoring bidder for recommendation.

Price and Specific Goals

Bidders will be evaluated based on the criteria below using **80/20** preferential point system

Price	Based on formula	80 points
Specific Goals	<ul style="list-style-type: none"> • Businesses owned by youth (5 points) • B-BBEE Certificate (15 points) 	20 points

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

Criteria	Weight	Sub-criteria												
Total Price	80/100	Benchmark against lowest quote												
Specific Goal	20/100	<p>Specific Goals points will be awarded to bidders according to their size of the firm as follows:</p> <ul style="list-style-type: none">• Businesses owned by youth:<ul style="list-style-type: none">a. 5 points to be awarded to businesses owned by youth. BEE certificate or National Treasury Central Supplier Database Report shall be used to verify the ownership by youth (51% and above ownership %).• B-BBEE Certificate:<ul style="list-style-type: none">a. 15 points to be awarded to bidders based on the BBBEE status level of contributor as indicated in the BBBEE accreditation certification in line with the table below. <table><tr><th>BBBEE LEVELS</th><th>SCORES</th></tr><tr><td>Level 1</td><td>15</td></tr><tr><td>Level 2</td><td>12</td></tr><tr><td>Level 3</td><td>9</td></tr><tr><td>Level 4</td><td>6</td></tr><tr><td>Level 5</td><td>3</td></tr></table>	BBBEE LEVELS	SCORES	Level 1	15	Level 2	12	Level 3	9	Level 4	6	Level 5	3
BBBEE LEVELS	SCORES													
Level 1	15													
Level 2	12													
Level 3	9													
Level 4	6													
Level 5	3													

Annex B: Pricing Schedule

PRICING TABLE

The bidders should submit their total project amount per project milestone, which shall be applicable for this bid and the cost per deliverable:

- Review of existing functional requirements done for the EDMS phase 1 assessment project.
- Conduct independent stakeholder consultations.
- Implement an EDMS system in line with best practices.

No	Item	Quantity	Unit Price	Total
1	Project Management services <ul style="list-style-type: none"> • Project initiation • Project Plan 			
2	EDMS Requirements gathering and validation.			
3	EDMS Solution			
4	System development and configurations			
5	System Testing			
6	User Acceptance Testing and sign-off			
7	Software licences for 36 months, billed annually.			
8	Data migration from existing portals			
9	Testing of data migrated and sign-off			
10	Documentation of as-built documents for the EDMS.			
11	System handover of all deliverables			
12	Maintenance and support for 36 months (to be billed monthly – 10 hours per month and unused hours should roll-over)			
13	Online group End user training (Rate per Session)	Online Session up to 4 Sessions		
14	Storage Cost			
15	Backup Cost			
16	Virtual machine / SQL Licenses			
17	Other costs- specify			
	TOTAL BEFORE VAT			
	PLUS 15% VAT			
	GRAND TOTAL INCLUSIVE OF 15% VAT (ENSURE TO INCLUDE ALL APPLICABLE ESCALATIONS FIXED FOR 3 YEARS IN YOUR GRAND TOTAL)			

NB: Maintenance and support will be paid on monthly basis upon receipt of monthly invoices.

Service provider must provide fixed rates card for all resources and services that will be utilised during the project period.

The quoted rates must be inclusive of all price increases; therefore, the quoted rates must be all inclusive and no further price increase shall be accommodated during the duration of the contract. The submitted total bid price/rates must be fixed for the duration of the project.

7. Due diligence

WRC reserves the right to conduct supplier due diligence prior to the final award or at any time during the contract period. This may include requests for additional information where necessary.

8. CONTRACT PERFORMANCE

To improve project management and service providers' performance, the WRC will conduct an analysis and mid-term review of the work performance of service provided to identify areas for improvement, aimed to ensure optimal outcomes, and this will include evaluating the scope of work after every project deliverable to test on whether the service was rendered in line with the scope of work. WRC reserves the right to cancel the contract in case of the service provider's failure to perform at optimal level after being afforded the opportunity to remedy poor performance or inability to render quality service. Service provider's performance will be monitored and managed against the agreed Project Plan and Service Contract.

9. CONFIDENTIALITY

All information related to this RFP is to be treated with strict confidence. In this regard Respondents are required to certify that they have acquainted themselves with the Non-Disclosure Agreement.

All information related to a subsequent contract, both during and after completion thereof, will be treated with strict confidence and subject to signing of Non-Disclosure Agreement. Should the need however arise to divulge any information related to this RFP or the subsequent contract, written approval must be obtained from WRC.

10. LIMITATION OF LIABILITY

A bidder participates in this bid process entirely at its own risk and cost. WRC shall not be liable to compensate a bidder on any grounds whatsoever for any costs incurred or any damages suffered because of the Bidder's participation in this Bid process.

This annexure should be completed and signed by the Bidder's authorised personnel as indicated below:

- 1 Please indicate your total bid price here: R.....
(Total Bid Amount – All Inclusive)
- 2 **Important:** It is mandatory to indicate your total bid price as requested above. This price must be the same as the total bid price you submit in your pricing schedule. Should the total bid prices differ, the one indicated above shall be considered the correct price.
- 3 **NOTE:** All prices must be VAT inclusive (15% - where applicable) and must be quoted in South African Rand (ZAR).
- 4 Are the rates quoted firm for the full period of the contract?
- 5 **Mandatory:** Price must be fixed for the duration of the bid validity.

YES	NO
-----	----

Price Declaration Form

To: WRC,

Having read through and examined the Tender Document, Tender no. **WRC-002-2025/26** the General Conditions, The Requirement and all other Annexes to the Tender Document, we offer for the **development, support and maintenance of the Electronic Document Management Systems (EDMS) implementation including file server migration to cloud service**, for the total tendered contract sum of:

R _____ (including VAT)

In Words: _____ (including VAT)

We confirm that this price covers all activities associated with the rendering of the **development, support and maintenance of the Electronic Document Management Systems (EDMS) implementation including file server migration to cloud service**. We undertake to hold this offer open for acceptance for a period of 120 days from the date of submission of offers. We further undertake that upon final acceptance of our offer, we will commence with delivery when required to do so by the Client.

Moreover, we agree that until formal Contract Documents have been prepared and executed, this Form of Tender, together with a written acceptance from the Client shall constitute a binding agreement between us, governed by the terms and conditions set out in this Request for Proposals.

We understand that you are not bound to accept the lowest or any offer and that we must bear all costs which we have incurred in connection with preparing and submitting this tender.

We hereby undertake for the period during which this tender remains open for acceptance not to divulge to any persons, other than the persons to which the tender is submitted, any information relating to the submission of this tender or the details therein except where such is necessary for the submission of this tender.

SIGNED

DATE

(Print name of signatory)

Designation

FOR AND ON BEHALF OF:

COMPANY NAME

Tel No

Email

Cell No

BIDDER'S DISCLOSURE**1. PURPOSE OF THE FORM**

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

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

2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise,
employed by the state? **YES/NO**

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

Full Name	Identity Number	Name of State institution

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

2.2.1 If so, furnish particulars:

.....
.....

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

2.3.1 If so, furnish particulars:

.....

¹ the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

.....

3 DECLARATION

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

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

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

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

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

² 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.

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

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

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

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

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

1.2 To be completed by the organ of state

(delete whichever is not applicable for this tender).

(a) The applicable preference point system for this tender is the 80/20 preference point system.

(b) 80/20 preference point system will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

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

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

1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	100

1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

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

2. DEFINITIONS

(a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation.

(b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;

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

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 PREFERENCE POINT SYSTEMS

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

80/20

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

Where

- Ps = Points scored for price of tender under consideration
- Pt = Price of tender under consideration
- Pmin = Price of lowest acceptable tender

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

3.2.1. POINTS AWARDED FOR PRICE

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

80/20

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

Where

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

4. POINTS AWARDED FOR SPECIFIC GOALS

4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:

4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—

(a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or

(b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system, then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

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

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

Criteria	Weight	Sub-criteria												
Total Price	80/100	Benchmark against lowest quote												
Specific Goal	20/100	<p>Specific Goals points will be awarded to bidders according to their size of the firm as follows:</p> <ul style="list-style-type: none">• Businesses owned by youth:<ol style="list-style-type: none">a. 5 points to be awarded to businesses owned by youth. BEE certificate or National Treasury Central Supplier Database Report shall be used to verify the ownership by youth (51% and above ownership %).• B-BBEE Certificate:<ol style="list-style-type: none">a. 15 points to be awarded to bidders based on the BBBEE status level of contributor as indicated in the BBBEE accreditation certification in line with the table below. <table><tr><th>BBBEE LEVELS</th><th>SCORES</th></tr><tr><td>Level 1</td><td>15</td></tr><tr><td>Level 2</td><td>12</td></tr><tr><td>Level 3</td><td>9</td></tr><tr><td>Level 4</td><td>6</td></tr><tr><td>Level 5</td><td>3</td></tr></table>	BBBEE LEVELS	SCORES	Level 1	15	Level 2	12	Level 3	9	Level 4	6	Level 5	3
BBBEE LEVELS	SCORES													
Level 1	15													
Level 2	12													
Level 3	9													
Level 4	6													
Level 5	3													

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

The specific goals allocated points in terms of this tender - Youth owned enterprises (51% and above ownership %) and B-BBEE Status Level Of Contributor	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Youth owned enterprises (51% and above ownership %)	5 Points	
B-BBEE Status Level	15 Points	
1	15	
2	12	
3	9	
4	6	
5	3	
Non-compliant contributor	0	

DECLARATION WITH REGARD TO COMPANY/FIRM

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

4.4. Company registration number:

4.5. TYPE OF COMPANY/ FIRM

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

[TICK APPLICABLE BOX]

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

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –

- (a) disqualify the person from the tendering process;

- (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
- (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
- (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
- (e) forward the matter for criminal prosecution, if deemed necessary.

..... SIGNATURE(S) OF TENDERER(S)	
SURNAME AND NAME:
DATE:
ADDRESS:

Annex N: Record of Addendum

I / We confirm that the following communications amending the tender documents that I / we received from the employer or his representative before the closing date for submission of this tender offer have been taken into account in this tender offer.

ADDENDUM No	DATE RECEIVED	TITLE OR DETAILS

SIGNATURE: DATE:
(of person authorized to sign on behalf of the Tenderer)

PLEASE INITIAL EACH PAGE OF THE GENERAL CONDITIONS OF CONTRACT

GOVERNMENT PROCUREMENT GENERAL CONDITIONS OF CONTRACT

July 2010

NOTES

The purpose of this document is to:

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

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

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

TABLE OF CLAUSES

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General Conditions of Contract

1. Definitions

1. The following terms shall be interpreted as indicated:
 - 1.1 “Closing time” means the date and hour specified in the bidding documents for the receipt of bids.
 - 1.2 “Contract” means the written agreement entered into between the purchaser and the supplier, as recorded in the contract form signed by the parties, including all attachments and appendices thereto and all documents incorporated by reference therein.
 - 1.3 “Contract price” means the price payable to the supplier under the contract for the full and proper performance of his contractual obligations.
 - 1.4 “Corrupt practice” means the offering, giving, receiving, or soliciting of anything of value to influence the action of a public official in the procurement process or in contract execution.
 - 1.5 Countervailing duties" are imposed in cases where an enterprise abroad is subsidized by its government and encouraged to market its products internationally.
 - 1.6 “Country of origin” means the place where the goods were mined, grown or produced or from which the services are supplied. Goods are produced when, through manufacturing, processing or substantial and major assembly of components, a commercially recognized new product results that is substantially different in basic characteristics or in purpose or utility from its components.
 - 1.7 “Day” means calendar day.
 - 1.8 “Delivery” means delivery in compliance of the conditions of the contract or order.
 - 1.9 “Delivery ex stock” means immediate delivery directly from stock actually on hand.
 - 1.10 “Delivery into consignees store or to his site” means delivered and unloaded in the specified store or depot or on the specified site in compliance with the conditions of the contract or order, the supplier bearing all risks and charges involved until the supplies are so delivered and a valid receipt is obtained.
 - 1.11 "Dumping" occurs when a private enterprise abroad market its goods on own initiative in the RSA at lower prices than that of the country of origin and which have the potential to harm the local industries in the RSA.
 - 1.12 " Force majeure" means an event beyond the control of the supplier and not involving the supplier's fault or negligence and not foreseeable. Such events may include, but is not restricted to, acts of the purchaser in its sovereign capacity, wars or revolutions, fires, floods, epidemics, quarantine restrictions and freight embargoes.
 - 1.13 “Fraudulent practice” means a misrepresentation of facts in order to influence a procurement process or the execution of a contract to the detriment of any bidder, and includes collusive practice among bidders (prior to or after bid submission) designed to establish bid prices at artificial non-competitive levels and to deprive the bidder of the benefits of free and open competition.
 - 1.14 “GCC” means the General Conditions of Contract.
 - 1.15 “Goods” means all of the equipment, machinery, and/or other materials that the supplier is required to supply to the purchaser under the contract.

- 1.16 “Imported content” means that portion of the bidding price represented by the cost of components, parts or materials which have been or are still to be imported (whether by the supplier or his subcontractors) and which costs are inclusive of the costs abroad, plus freight and other direct importation costs such as landing costs, dock dues, import duty, sales duty or other similar tax or duty at the South African place of entry as well as transportation and handling charges to the factory in the Republic where the supplies covered by the bid will be manufactured.
- 1.17 “Local content” means that portion of the bidding price which is not included in the imported content provided that local manufacture does take place.
- 1.18 “Manufacture” means the production of products in a factory using labour, materials, components and machinery and includes other related value-adding activities.
- 1.19 “Order” means an official written order issued for the supply of goods or works or the rendering of a service.
- 1.20 “Project site,” where applicable, means the place indicated in bidding documents.
- 1.21 “Purchaser” means the organization purchasing the goods.
- 1.22 “Republic” means the Republic of South Africa.
- 1.23 “SCC” means the Special Conditions of Contract.
- 1.24 “Services” means those functional services ancillaries to the supply of the goods, such as transportation and any other incidental services, such as installation, commissioning, provision of technical assistance, training, catering, gardening, security, maintenance and other such obligations of the supplier covered under the contract.
- 1.25 “Written” or “in writing” means handwritten in ink or any form of electronic or mechanical writing.

2. Application

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

3. General

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

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 ; inspection

- 5.1 The supplier shall not, without the purchaser’s prior written consent, disclose the contract, or any provision thereof, or any specification, plan, drawing, pattern, sample, or information furnished by or on behalf, of the purchaser in connection therewith, to any person other

than a person employed by the supplier in the performance of the contract. Disclosure to any such employed person shall be made in confidence and shall extend only so far as may be necessary for purposes of such performance

- 5.2 The supplier shall not, without the purchaser's prior written consent, make use of any document or information mentioned in GCC clause 5.1 except for purposes of performing the contract.
- 5.3 Any document, other than the contract itself mentioned in GCC clause 5.1 shall remain the property of the purchaser and shall be returned (all copies) to the purchaser on completion of the supplier's performance under the contract if so, required by the purchaser.
- 5.4 The supplier shall permit the purchaser to inspect the supplier's records relating to the performance of the supplier and to have them audited by auditors appointed by the purchaser, if so, required by the purchaser.

6. Patent rights

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

7. Performance

Security

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

8. Inspections, tests and analyses

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

- 8.7 Any contract supplies may on or after delivery be inspected, tested or analysed 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

The supplier may be required to provide any or all of the following services, including additional services, if any, specified in SCC:

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

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

14. Spare parts	<p>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:</p> <p>(a) such spare parts as the purchaser may elect to purchase from the supplier, provided that this election shall not relieve the supplier of any warranty obligations under the contract; and</p> <p>(b) in the event of termination of production of the spare parts:</p> <p>(i) Advance notification to the purchaser of the pending termination, in sufficient time to permit the purchaser to procure needed requirements; and</p> <p>(ii) following such termination, furnishing at no cost to the purchaser, the blueprints, drawings, and specifications of the spare parts, if requested.</p>
15. Warranty	<p>15.1 The supplier warrants that the goods supplied under the contract are new, unused, of the most recent or current models, and that they incorporate all recent improvements in design and materials unless provided otherwise in the contract. The supplier further warrants that all goods supplied under this contract shall have no defect, arising from design, materials, or workmanship (except when the design and/or material is required by the purchaser's specifications) or from any act or omission of the supplier, that may develop under normal use of the supplied goods in the conditions prevailing in the country of final destination.</p> <p>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.</p> <p>15.3 The purchaser shall promptly notify the supplier in writing of any claims arising under this warranty.</p> <p>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.</p> <p>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.</p>
16. Payment	<p>16.1 The method and conditions of payment to be made to the supplier under this contract shall be specified in SCC.</p> <p>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.</p> <p>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.</p> <p>16.4 Payment will be made in Rand unless otherwise stipulated in SCC.</p>
17. Prices	<p>17.1 Prices charged by the supplier for goods delivered and services performed under the contract shall not vary from the prices quoted by the supplier in his bid, with the exception of any price adjustments authorized in SCC or in the purchaser's request for bid validity extension, as the case may be.</p>
18. Contract amendments	<p>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.</p>

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 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: <ul style="list-style-type: none"> (a) if the supplier fails to deliver any or all of the goods within the period(s) specified in the contract, or within any extension thereof granted by the purchaser pursuant to GCC Clause 21.2; (b) if the Supplier fails to perform any other obligation(s) under the contract; or (c) if the supplier, in the judgment of the purchaser, has engaged in corrupt or fraudulent practices in competing for or in executing the contract.

	23.2	In the event the purchaser terminates the contract in whole or in part, the purchaser may procure, upon such terms and in such manner as it deems appropriate, goods, works or services similar to those undelivered, and the supplier shall be liable to the purchaser for any excess costs for such similar goods, works or services. However, the supplier shall continue performance of the contract to the extent not terminated.
	23.3	Where the purchaser terminates the contract in whole or in part, the purchaser may decide to impose a restriction penalty on the supplier by prohibiting such supplier from doing business with the public sector for a period not exceeding 10 years.
	23.4	If a purchaser intends imposing a restriction on a supplier or any person associated with the supplier, the supplier will be allowed a time period of not more than fourteen (14) days to provide reasons why the envisaged restriction should not be imposed. Should the supplier fail to respond within the stipulated fourteen (14) days the purchaser may regard the intended penalty as not objected against and may impose it on the supplier.
	23.5	Any restriction imposed on any person by the Accounting Officer / Authority will, at the discretion of the Accounting Officer / Authority, also be applicable to any other enterprise or any partner, manager, director or other person who wholly or partly exercises or exercised or may exercise control over the enterprise of the first-mentioned person, and with which enterprise or person the first-mentioned person, is or was in the opinion of the Accounting Officer / Authority actively associated.
	23.6	<p>If a restriction is imposed, the purchaser must, within five (5) working days of such imposition, furnish the National Treasury, with the following information:</p> <p>(i) the name and address of the supplier and / or person restricted by the purchaser;</p> <p>(ii) the date of commencement of the restriction</p> <p>(iii) the period of restriction; and</p> <p>(iv) the reasons for the restriction.</p> <p>These details will be loaded in the National Treasury's central database of suppliers or persons prohibited from doing business with the public sector.</p>
	23.7	If a court of law convicts a person of an offence as contemplated in sections 12 or 13 of the Prevention and Combating of Corrupt Activities Act, No. 12 of 2004, the court may also rule that such person's name be endorsed on the Register for Tender Defaulters. When a person's name has been endorsed on the Register, the person will be prohibited from doing business with the public sector for a period not less than five years and not more than 10 years. The National Treasury is empowered to determine the period of restriction and each case will be dealt with on its own merits. According to section 32 of the Act the Register must be open to the public. The Register can be perused on the National Treasury website.
24. Anti-dumping and countervailing duties and rights	24.1	When, after the date of bid, provisional payments are required, or antidumping 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.
- 26.1 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 accrued thereafter to the purchaser.
- 27. Settlement of Disputes** 27.1 If any dispute or difference of any kind whatsoever arises between the purchaser and the supplier in connection with or arising out of the contract, the parties shall make every effort to resolve amicably such dispute or difference by mutual consultation.
- 27.2 If, after thirty (30) days, the parties have failed to resolve their dispute or difference by such mutual consultation, then either the purchaser or the supplier may give notice to the other party of his intention to commence with mediation. No mediation in respect of this matter may be commenced unless such notice is given to the other party.
- 27.3 Should it not be possible to settle a dispute by means of mediation; it may be settled in a South African court of law.
- 27.4 Mediation proceedings shall be conducted in accordance with the rules of procedure specified in the SCC.
- 27.5 Notwithstanding any reference to mediation and/or court proceedings herein,
(a) the parties shall continue to perform their respective obligations under the contract unless they otherwise agree; and
(b) the purchaser shall pay the supplier any monies due the supplier.
- 28. Limitation of liability** 28.1 Except in cases of criminal negligence or wilful misconduct, and in the case of infringement pursuant to Clause 6;
(a) the supplier shall not be liable to the purchaser, whether in contract, tort, or otherwise, for any indirect or consequential loss or damage, loss of use, loss of production, or loss of profits or interest costs, provided that this exclusion shall not apply to any obligation of the supplier to pay penalties and/or damages to the purchaser; and
(b) the aggregate liability of the supplier to the purchaser, whether under the contract, in tort or otherwise, shall not exceed the total contract price, provided that this limitation shall not apply to the cost of repairing or replacing defective equipment.
- 29. Governing language** 29.1 The contract shall be written in English. All correspondence and other document pertaining to the contract that is exchanged by the parties shall also be written in English.
- 30. Applicable law** 30.1 The contract shall be interpreted in accordance with South African laws, unless otherwise specified in SCC.
- 31. Notices** 31.1 Every written acceptance of a bid shall be posted to the supplier concerned by registered or certified mail and any other notice to him shall be posted by ordinary mail to the address furnished in his bid or to the address notified later by him in writing and such posting shall be deemed to be proper service of such notice
- 31.2 The time mentioned in the contract documents for performing any act after such aforesaid notice has been given, shall be reckoned from the date of posting of such notice.

32. Taxes and Duties

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

33. National Industrial Participation (NIP) Programme

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

34. Prohibition of Restrictive practices

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

