

# NKANGALA DISTRICT MUNICIPALITY



QUOTATION NO: FIN/005/02/2024

**APPOINTMENT OF A PROFESSIONAL ACTUARIAL VALUER TO COMPILE LONG SERVICE AWARD LIABILITY (LSA) AND POST EMPLOYMENT MEDICAL AID SUBSIDY LIABILITY (PEMA) IN TERMS OF GRAP 25 (AS AND WHEN REQUIRED) RE-ADVERT**

<b>Name of Entity</b>	
<b>Price (Excl. VAT)</b>	
<b>CSD M Number</b>	

<b>Prepared &amp; Issued By:</b> Supply Chain Management Unit Nkangala District Municipality 2A Walter Sisulu Street <b>MIDDELBURG</b> 1050 Tel: 013-249-2104 / 05 / 07 / 10 / 2158 Fax: 013-249-2087	<b>Enquiries:</b> <b>Mr SI Masilela</b> Department: Supply Chain Unit Nkangala District Municipality 2A Walter Sisulu Street <b>MIDDELBURG</b> 1050 Tel: 013-249-2104
--	--

## SUBMISSION DETAILS

<b>TENDER BOX</b>	NKANGALA DISTRICT MUNICIPALITY 2A WALTER SISULU STREET, GROUND FLOOR, MIDDELBURG(MPUMALANGA)
<b>CLOSING DATE AND TIME</b>	Friday, 01 <sup>st</sup> March 2024 @ 12H00

# NKANGALA DISTRICT MUNICIPALITY

QUOTATION NO: FIN/005/02/2024

**APPOINTMENT OF A PROFESSIONAL ACTUARIAL VALUER TO COMPILE LONG SERVICE AWARD LIABILITY (LSA) AND POST EMPLOYMENT MEDICAL AID SUBSIDY LIABILITY (PEMA) IN TERMS OF GRAP 25 (AS AND WHEN REQUIRED) RE-ADVERT**

CONTENTS
----------

**1. Procedures**

- 1.1 Notice and invitation to Quote
- 1.2 Instructions

**2. Returnable Documents**

- 2.1 List of returnable documents

**3. Agreements**

- 3.1 Form of Offer

**4. Bill of Quantities**

**5. Scope of Work**

# NKANGALA DISTRICT MUNICIPALITY

QUOTATION NO: FIN/005/02/2024

## APPOINTMENT OF A PROFESSIONAL ACTUARIAL VALUER TO COMPILE LONG SERVICE AWARD LIABILITY (LSA) AND POST EMPLOYMENT MEDICAL AID SUBSIDY LIABILITY (PEMA) IN TERMS OF GRAP 25 (AS AND WHEN REQUIRED) RE-ADVERT

Nkangala District Municipality invites tenders from suitably qualified service provider for the appointment of a professional actuarial valuer to compile long service award liability (LSA) and post-employment medical aid subsidy liability (PEMA) in terms of GRAP 25 (as and when required) Re-advert

Quotations may only be submitted on the quotation document issued. Copies of the quotation document will be available at Nkangala District Municipality Office Building at reception and on the website: [www.nkangaladm.gov.za](http://www.nkangaladm.gov.za)

Quotations, in a sealed envelope and clearly marked “**Quotation number and description of the project**” must be submitted in the Tender Box, Nkangala District Municipality, 2A Walter Sisulu Street, Middelburg, Mpumalanga, not later than **12H00 on 01<sup>st</sup> February 2024.**

### GENERAL:

- Quotations shall remain valid for a period of **90** days from closing date, no late, faxed or e-mailed quotations will be accepted.

For enquiries, please contact Mr AS Msiza from the Finance Services Department at 013-249-2112 or the Supply Chain Management Office at 013 249 2103/4/5/6/7/10/58 during office hours, Monday to Friday between 07H30-13H00 and 13H45-16H15.

Quotations will be evaluated in terms of the Supply Chain Management policy of the Nkangala District Municipality ([www.nkangaladm.gov.za](http://www.nkangaladm.gov.za)). The lowest quotation will not necessarily be accepted and the right to accept the whole or part of any quotation or not to consider any quotation not suitably endorsed is fully reserved by Nkangala District Municipality.

**MM SKOSANA – MUNICIPAL MANAGER**

**NKANGALA DISTRICT MUNICIPALITY**

<b>INSTRUCTIONS TO QUOTATIONS:</b>	
1.	Failure to complete all returnable schedules and signing thereof will result in an automatic disqualification.
2.	Proposals and any other supporting documents must be attached to the back of this quotation document.
3.	No quotation document will be considered unless submitted on Council's Official quotation Document.
4.	A quotation document submitted by a registered company may not be considered unless accompanied by a resolution of a Board of Directors of the Company authorizing the person to sign the quotation document on behalf of the Company.
5.	Quotations completed in ink shall be submitted in a sealed envelope, clearly marked with the relevant Project number and / or project description, to Tender Box, Nkangala District Municipality 2A Walter Sisulu Street, and Middelburg.
6.	Quotations received after the closing date and time shall not be considered.
7.	The Council retains the right to call for any additional information that it may deem necessary
8.	The Council will not be held responsible for any expenses incurred by the company in preparing and submitting the quotations.
9.	If quoting as a Joint Venture, the Joint Venture Agreement must be submitted with the quotation documents detailing the split of responsibilities in terms of the tender specifications, i.e. percentage of work to be done by each partner.
10.	Check the quotation documents on receipt for completeness and notify the employer of any discrepancy or omission.
11.	Treat as confidential all matters arising in connection with the quotation. Use and copy the documents issued by the employer only for the purpose of preparing and submitting a quotation offer in response to the invitation.
12.	Obtain, as necessary for submitting a quotation, copies of the latest versions of standards, specifications, conditions of contract and other publications, which are not attached but which are incorporated into the quotation documents by reference
13.	Pricing the tender  State the rates and prices in South African currency (ZAR) Rand.
14.	Quotation communicated on paper shall be submitted as an original.
15.	<b>Telephonic, telegraphic, telex, facsimile or e-mailed quotations will <u>not</u> be accepted.</b>
16.	Accept that quotations, which do not provide all the data or information requested completely and, in the form, required, may be regarded by the employer as non-responsive

17	The quotation validity period is <b>90 Days</b> .
18	The company quoting, when requested by the Employer to do so, submit the names of all management and supervisory staff that will be employed to supervise the Labour Intensive portion of the works together with satisfactory evidence that such staff members satisfy the eligibility requirements.
19	<p><b>The following is required to be submit with the quotation:</b></p> <p><b>(1) A valid Tax Clearance Certificate issued by the South African Revenue Services;</b></p> <p><b>(2) A copy of the Company / CC Registration. In case of Joint Venture –both companies / cc to submit registration documentation.</b></p> <p><b>(3) In case of Joint Venture – the Joint Venture Agreement.</b></p> <p><b>(4) Duly signed and dated of Authority of Signatory on company Letterhead.</b></p> <p><b>(5) Specific Goals in terms of the provisions of the Preferential procurement Regulations, 2022</b></p>
20	<p><b>Eligibility</b></p> <p>Only those bidders who satisfy the following criteria will be considered and eligible to submit tenders:</p> <ul style="list-style-type: none"> <li>• Project Director/ Leader with an Actuarial Membership</li> <li>• Firm or Project Manager having been previously involved in one or more projects of similar nature and size.</li> <li>• Firm or Project Manager with an in-depth understanding as an actuarial valuer</li> </ul>
21	<p><b>Confidentiality and Copyright of Documents.</b></p> <p>Treat as confidential all matters arising in connection with the tender. Use and copy the documents issued by the employer only for the purpose of preparing and submitting a tender offer in response to the invitation.</p> <p><b>In submitting any information or documentation requested in this tender or any other information that may be requested pursuant to this Tender, you are consenting to the processing by NDM or its stakeholders of your personal information and all other personal information contained therein, as contemplated in the Protection of Personal Information Act, No.4 of 2013 and Regulations promulgated thereunder (“POPI Act”). Further, you declare that you have obtained all consents required by the POPI Act or any other law applicable. Thus, you hereby indemnify NDM against any civil or criminal action, administrative fine or other penalty or loss that may arise as a result of the processing of any personal information that you submit.</b></p>
22	<b>Financial ability to execute the contract:</b>

	<p>Evaluation of the Tenderer's financial ability to execute the contract will not be considered. Emphasis will be placed on the following:</p> <ul style="list-style-type: none"> <li>Professional Indemnity <b>for R20 million</b></li> </ul>								
23	<b>Evaluation points</b>								
23.1	<p>Preference points for this bid shall be awarded for:</p> <ul style="list-style-type: none"> <li>(a) Price; and</li> <li>(b) Specific Goals in terms of the Preferential Procurement Regulations 2022</li> </ul>								
23.2	The maximum points for this quotation are allocated as follows:								
	<table border="1"> <tr> <td></td><td><b>POINTS</b></td></tr> <tr> <td><b>PRICE</b></td><td><b>80</b></td></tr> <tr> <td><b>SPECIFIC GOALS</b></td><td><b>20</b></td></tr> <tr> <td><b>Total points for Price and Specific Goals must not exceed</b></td><td><b>100</b></td></tr> </table>		<b>POINTS</b>	<b>PRICE</b>	<b>80</b>	<b>SPECIFIC GOALS</b>	<b>20</b>	<b>Total points for Price and Specific Goals must not exceed</b>	<b>100</b>
	<b>POINTS</b>								
<b>PRICE</b>	<b>80</b>								
<b>SPECIFIC GOALS</b>	<b>20</b>								
<b>Total points for Price and Specific Goals must not exceed</b>	<b>100</b>								
24	<p><b>Evaluation Criteria</b></p> <p>The procedure for the evaluation of responsive Bids will be on the average of the previous three projects where the firm was involved</p>								
25	Tenders are adjudicated in terms of NDM Supply Chain Management Policy, and the following framework is provided as a guideline in this regard.								
26	<p>Tender responsiveness shall mean tender compliance with all the prescribed key requirements for submission with this tender which are regarded as eliminating factors. Elimination factors include non-compliance with key requirements specified for the following:</p> <ul style="list-style-type: none"> <li>Project Director/Team Leader (30 Points);</li> <li>Methodology (20 points)</li> <li>Experience of firm in (30)</li> </ul> <p><b><u>A FIRM MUST OBTAIN A MINIMUM OF 50 POINTS OUT OF THE 80 POINTS ABOVE TO BE CONSIDERED FOR PRICE AND BBB-EE EVALUATION.</u></b></p> <p><b>Project Director / Team Leader : (Maximum Points obtainable 30)</b></p>								

**Name of Project Director/Leader:**.....

Evaluation Criteria	Minimum Required	Elimination Factor	Points obtainable	Points Claimed
Academic Qualifications (Note 1)	Degree in the field of Actuarial Science	Yes	5	
Professional Registration (Note 2)	Member of Actuarial Society.	Yes	10	
Experience after qualification ( Note 3 )	1 - 3 Years	No	5	
	4 years- More	No	10	
Current Employment (Note 5)	Contracted by the Consulting Firm	No	2	
	Full time employed by the Consulting Firm	No	5	
<b>SUB TOTAL</b>			<b>30</b>	<b>0</b>

#### Methodology

*(Maximum Points obtainable 20)*

Evaluation Criteria	Minimum Required	Elimination Factor	Points obtainable	Points Claimed
Appropriateness and responsiveness of proposed methodology of carrying out the assignments to the terms of reference	To be clearly articulated in the proposal.	No	20	
<b>SUB TOTAL</b>			<b>20</b>	<b>0</b>

#### Experience of the firm

*(Maximum Points obtainable 30)*

Evaluation Criteria	Minimum Required	Elimination Factor	Points obtainable	Points Claimed
Company experience via appointment letters to Actuarial Valuations (Note 6)	1-3	No	15	
	4 - more	No	30	
<b>SUB TOTAL</b>			<b>30</b>	

#### Note 1: Academic Qualifications

Proof of academic qualifications in the form of copies **not older than three (3) months** must be attached to the Team Leader/Project Director's CV. Foreign qualifications must be accompanied by a certificate from Qualifications Certification Body (SAQA verified ). The proposed Project

	<p>Director/Team Leader shall be in possession of at least a Degree in the field of Actuarial Science/Accounting.</p> <p><b>Note 2: Professional Registration</b> Proof of registration of the Firm or Project Leader/ Director with the Actuarial Society</p> <p><b>Note 3: Experience after qualification!</b> A minimum of 1 year post qualification experience is required for the team leader. More than 4 years post qualification experience is <b>not</b> an eliminating factor but carries more points.</p> <p><b>Note 4: Employment History (Involvement in comparable projects)</b> Employment history must be contained in the Curriculum Vitae (CV) and must include references and contact details. The CV must contain only necessary and relevant information for the purpose of this project.</p> <p><b>Note 5: Current Employment</b> Confirmation of current employment in the form of letter from Supervisor must be attached. In the event a Project Director/Leader is his/her own Supervisor, a letter confirming same must still be attached. The proposed Project Director/Leader shall be a Senior Employee, an Associate, the Director, or a Shareholder and in the direct employ of the Consulting Firm. A proof or separate written confirmation must be attached to the CV. Where a proposed Team Leader is seconded from a rival Consulting Firm, an agreement between the two entities as well as a written undertaking confirming the person's full time availability for the duration of a project must be attached to the CV.</p> <p><b>Note 6: Company's previous completed projects.</b> Provide proof of the company's previous completed projects which in the form of appointment letters and completion certificate or testimonials must be attached. Verifiable references (appointment letters) with contact details must be provided. Track record as per attached form O should be completed however it's not an elimination but warrant zero points in case it's incomplete.</p> <p>The procedure for the evaluation of responsive Bids will be on the average of the previous one (1) projects where the firm was involved. Reference of clients <b>MUST</b> be provided on Form O.</p>
27	The number of paper copies of the signed contract to be provided by the Employer is one.
28	<p>The additional conditions of quotation are:</p> <ol style="list-style-type: none"> <li>1 Service providers who has scored the highest points for Price and Specific Goals in terms of the Preferential Procurement Regulations 2022 will be appointed and the maximum number is limited to <b>one (01)</b></li> </ol>

	<p>2 Nkangala District Municipality may also request that the company quoting provide written evidence that his financial, labor and resources are adequate for carrying out the project.</p> <p>3 The Nkangala District Municipality reserves the right to appoint a firm of chartered accountants and auditors and / or execute any other financial investigations on the financial resources of any entity quoting. The entity quoting shall provide all reasonable assistance in such investigations.</p> <p>4 The Nkangala District Municipality reserves the right to appoint a different Contractor for each project. The entity quoting shall be required to complete the form of offer.</p> <p>5 That the issuing by the contractor of cessions is expressly prohibited except if and when prior written approval of the Nkangala District Municipality under the signature of the Municipal Manager for the issue of a cession has been requested and obtained.</p> <p>6 That the Council reserves the right not to appoint contractor whose contract was terminated due to non-performance by this Council in the past 5 years.</p>
--	--

# NKANGALA DISTRICT MUNICIPALITY

QUOTATION NO: FIN/005/02/2024

## APPOINTMENT OF A PROFESSIONAL ACTUARIAL VALUER TO COMPILE LONG SERVICE AWARD LIABILITY (LSA) AND POST EMPLOYMENT MEDICAL AID SUBSIDY LIABILITY (PEMA) IN TERMS OF GRAP 25 (AS AND WHEN REQUIRED) RE-ADVERT

### T2.1 LIST OF RETURNABLE DOCUMENTS

The following returnable Schedules MUST be completed:

#### Returnable Schedules required for evaluation purposes

Form A	INVITATION TO BID
Form B	DECLARATION OF GOOD STANDING REGARDING TAX
Form C	DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES
Form D	AUTHORITY OF SIGNATORY
Form E	PREFERENCE SCHEDULE
Form F	DECLARATION OF INTEREST
Form G	FINANCIAL REFERENCES /BIDDER'S CREDIT RATING AND BANK DETAILS
Form H	CERTIFICATE OF INDEPENDENT BID DETERMINATION
Form I	DECLARATION OF MUNICIPAL ACCOUNT
Form J	PROOF OF REGISTRATION WITH PROFESSIONAL BODIES
Form K	PROFESSIONAL INDEMNITY INSURANCE
Form L	TENDER PROJECT STRUCTURE
Form M	PROPOSED KEY PERSONNEL
Form N	SCHEDULE OF PREVIOUS EXPERIENCE
Form O	SCHEDULE OF CURRENT PROJECTS
Form P	SCHEDULE OF PROPOSED SUB- CONTRACTORS
Form Q	DECLARATION OF TENDERER'S LITIGATION HISTORY

## PART A

### INVITATION TO BID

<b>YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF MUNICIPALITY/ MUNICIPAL ENTITY)</b>					
BID NUMBER:	FIN/005/02/2024	CLOSING DATE:	23 FEBRUARY 2024	CLOSING TIME:	12:00
DESCRIPTION	APPOINTMENT OF A PROFESSIONAL ACTUARIAL VALUER TO COMPILE LONG SERVICE AWARD LIABILITY (LSA) AND POST EMPLOYMENT MEDICAL AID SUBSIDY LIABILITY (PEMA) IN TERMS OF GRAP 25 (AS AND WHEN REQUIRED) RE-ADVERT				
<b>THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (MBD7).</b>					
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
NKANGALA DISTRICT MUNICIPALITY					
2A WALTER SISULU STREET					
MIDDELBURG					
MPUMALANGA					
1050					
<b>SUPPLIER INFORMATION</b>					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
TAX COMPLIANCE STATUS	TCS PIN:		OR	CSD No:	
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?		<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER PART B:3]
TOTAL NUMBER OF ITEMS OFFERED			TOTAL BID PRICE	R	
SIGNATURE OF BIDDER	.....		DATE		
CAPACITY UNDER WHICH THIS BID IS SIGNED					
<b>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO:</b>			<b>TECHNICAL INFORMATION MAY BE DIRECTED TO:</b>		
DEPARTMENT	Supply Chain		CONTACT PERSON	Mr AS Msiza	
CONTACT PERSON	Mr S.I Masilela		TELEPHONE NUMBER	013 249 2112	
TELEPHONE NUMBER	013 249 2104		FACSIMILE NUMBER		
FACSIMILE NUMBER			E-MAIL ADDRESS		
E-MAIL ADDRESS					

## PART B TERMS AND CONDITIONS FOR BIDDING

<b>1. BID SUBMISSION:</b>
<p>1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.</p> <p>1.2. <b>ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED (NOT TO BE RE-TYPED) OR ONLINE</b></p> <p>1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT AND THE PREFERENTIAL PROCUREMENT REGULATIONS THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.</p>
<b>2. TAX COMPLIANCE REQUIREMENTS</b>
<p>2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.</p> <p>2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.</p> <p>2.3 APPLICATION FOR THE TAX COMPLIANCE STATUS (TCS) CERTIFICATE OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE WWW.SARS.GOV.ZA.</p> <p>2.4 FOREIGN SUPPLIERS MUST COMPLETE THE PRE-AWARD QUESTIONNAIRE IN PART B:3.</p> <p>2.5 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.</p> <p>2.6 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.</p> <p>2.7 WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.</p>
<b>3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS</b>
<p>3.1. IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? <span style="float: right;"><input type="checkbox"/> YES <input type="checkbox"/> NO</span></p> <p>3.2. DOES THE ENTITY HAVE A BRANCH IN THE RSA? <span style="float: right;"><input type="checkbox"/></span> YES <input type="checkbox"/> NO</p> <p>3.3. DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA? <span style="float: right;"><input type="checkbox"/> YES <input type="checkbox"/> NO</span></p> <p>3.4. DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA? <span style="float: right;"><input type="checkbox"/> YES <input type="checkbox"/> NO</span></p> <p>3.5. IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? <span style="float: right;"><input type="checkbox"/> YES <input type="checkbox"/> NO</span></p> <p><b>IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 ABOVE.</b></p>

**NB: FAILURE TO PROVIDE ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID. NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE.**

SIGNATURE OF BIDDER: .....

CAPACITY UNDER WHICH THIS BID IS SIGNED: .....

DATE: .....

## **ATTACH THE FOLLOWING DOCUMENTS HERETO**

**1. For Closed Corporations**

- CK1 or CK2 as applicable (Founding Statement)
- Copy(s) of ID(s) of Director(s)

**2. For Companies**

- A copy of the Certificate of Incorporation
- Copy(s) of ID(s) of Director(s) and
- the shareholders register.

**3. For Joint Venture Agreements**

- Copy of the Joint Venture Agreement between all the parties,
- as well as the documents in (1) or (2) of each Joint Venture member.

**4. For Partnership**

- Copy(s) of ID(s) of Director(s) of the partners

**5. One person Business / Sole trader**

- Copy of ID

**6. Details of Tax Compliance Status from South African Revenue Service and Provide eSARS to access.**

**7. Duly Signed and dated original or copy of Authority of Signatory on company Letterhead**

**8. Central Supplier Database (CSD) full report which contains ownership information to claim specific goals points in terms of the Preferential Procurement Regulations, 2022**

**FORM B: DECLARATION OF GOOD STANDING REGARDING TAX (MBD 2)****DETAILS OF TAX COMPLIANCE STATUS:**

TAXPAYER NAME	
TRADING NAME	
TAX REFERENCE NUMBER (S)	
VAT	
PIN	
EXPIRY DATE	

**TAX CLEARANCE CERTIFICATE REQUIREMENTS**

It is a condition of bid that the taxes of the successful bidder must be in order, or that satisfactory arrangements have been made with South African Revenue Service (SARS) to meet the bidder's tax obligations.

1. In order to meet this requirement bidders are required to apply for Tax Compliance Status (TCS) online or at any SARS branch office nationally. The Tax Compliance Status (TCS) requirements are also applicable to foreign bidders / individuals who wish to submit bids.
2. SARS will then furnish the bidder with a Tax Compliance Status (TCS) that will be valid for a period of 1 (one) year from the date of approval.
3. The Tax Compliance Status (TCS) must be submitted together with the bid. Failure to submit the Tax Compliance Status (TCS) will result in the invalidation of the bid.
4. In bids where Consortia / Joint Ventures / Sub-contractors are involved, each party must submit a separate Tax Compliance Status (TCS).
5. Applications for the Tax Compliance Status (TCS) may also be made via eFiling. In order to use this provision, taxpayers will need to register with SARS as eFilers through the website [www.sars.gov.za](http://www.sars.gov.za).

## FORM C: DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

- 1 This Municipal Bidding Document must form part of all bids invited.
- 2 It serves as a declaration to be used by municipalities and municipal entities in ensuring that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system.
- 3 The bid of any bidder may be rejected if that bidder, or any of its directors have:
  - a. abused the municipality's / municipal entity's supply chain management system or committed any improper conduct in relation to such system;
  - b. been convicted for fraud or corruption during the past five years;
  - c. willfully neglected, reneged on or failed to comply with any government, municipal or other public sector contract during the past five years; or
  - d. been listed in the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2005).
- 4 **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**

Item	Question	Yes	No
4.1	<p><b>Is the bidder or any of its directors listed on the National Treasury's Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector?</b></p> <p>(Companies or persons who are listed on this Database were informed in writing of this restriction by the Accounting Officer/Authority of the institution that imposed the restriction after the <i>audialterampartem</i> rule was applied).</p> <p>The Database of Restricted Suppliers now resides on the National Treasury's website (<a href="http://www.treasury.gov.za">www.treasury.gov.za</a>) and can be accessed by clicking on its link at the bottom of the home page.</p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.1.1	If so, furnish particulars:		
4.2	<p><b>Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2005)?</b></p> <p><b>The Register for Tender Defaulters can be accessed on the National Treasury's website (<a href="http://www.treasury.gov.za">www.treasury.gov.za</a>) by clicking on its link at the bottom of the home page.</b></p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.2.1	If so, furnish particulars:		

4.3	Was the bidder or any of its directors convicted by a court of law (including a court of law outside the Republic of South Africa) for fraud or corruption during the past five years?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.3.1	If so, furnish particulars:		
4.4	<b>Does the bidder or any of its directors owe any municipal rates and taxes or municipal charges to the municipality / municipal entity, or to any other municipality / municipal entity, that is in arrears for more than three months?</b>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.4.1	If so, furnish particulars:		
4.5	Was any contract between the bidder and the municipality / municipal entity or any other organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.7.1	If so, furnish particulars:		

#### CERTIFICATION

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

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

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

.....  
**Signature**

.....  
**Date**

.....  
**Position**

.....  
**Name of Bidder**

**FORM D: AUTHORITY OF SIGNATORY**

Details of person responsible for tender process:

Name :	
Contact number :	
Office address :	

Signatories for close corporations and companies shall confirm their authority by completing and attaching to this form a **duly signed and dated original or copy on the Company Letterhead** of the relevant resolution of their members or their board of directors, as the case may be.

**PRO-FORMA FOR COMPANIES AND CLOSE CORPORATIONS:**

"By resolution of the board of directors passed on (date) .....

Mr .....  


has been duly authorized to sign all documents in connection with the Tender for Contract Number

.....and any Contract which may arise there from on

behalf of .....

(BLOCK CAPTIALS)

SIGNED ON BEHALF OF THE COMPANY .....

IN HIS CAPACITY AS .....

DATE .....

FULL NAMES OF SIGNATORY .....

AS WITNESSES: 1. ....

2. ....

**ATTACH HERETO THE DULY SIGNED AND DATED ORIGINAL OR A  
COPY OF AN AUTHORITY OF SIGNATORY ON COMPANY  
LETTERHEAD**

## PRO-FORMA FOR JOINT VENTURES:

### Certificate of Authority for Joint Ventures

We, the undersigned, are submitting this tender offer in Joint Venture and hereby authorise Mr/Ms ....., authorised signatory of the company ....., acting in the capacity of lead partner, to sign all documents in connection with the tender offer and any contract resulting from it on our behalf.

NAME OF FIRM	ADDRESS	DULY AUTHORISED SIGNATORY
		Signature: ..... Name: ..... Designation: .....
		Signature: ..... Name: ..... Designation: .....
		Signature: ..... Name: ..... Designation: .....
		Signature: ..... Name: ..... Designation: .....

## FORM E: PREFERENCE SCHEDULE

MBD 6.1

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

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

**NB: BEFORE COMPLETING THIS FORM, BIDDERS 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 all bids:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); **AND**

- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 The value of this bid is estimated to not exceed R50 000 000 (all applicable taxes included) and therefore the 80/20 System shall be applicable.

1.3 Preference points for this bid shall be awarded for:

(c) Price; and

(d) Specific goals in terms of the Preferential Procurement Regulations 2022

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

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

1.4 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

1.5 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

2.1 **“black people”** is a generic term which means Africans, Coloureds and Indians;

- 2.2 **“broad-based black economic empowerment”** means the economic empowerment of all black people including women, workers, youth, people with disabilities and people living in rural areas through diverse but integrated socio-economic strategies that include. but are not limited to:
- increasing the number of black people that manage, own and control enterprises and productive assets; facilitating ownership and management of enterprises and productive assets by communities, workers, cooperatives and other collective enterprises;
  - human resource and skills development;
  - achieving equitable representation in all occupational categories and levels in the workforce;
  - preferential procurement; and
  - investment in enterprises that are owned or managed by black people;
- 2.3 **“Designated group”** means Black designated groups; Black people; Women; People with disabilities; or Small enterprises, as defined in section 1 of the National Small Enterprise Act, 1996 (Act No. 102 of 1996);
- 2.4 **“Disability”** means, in respect of a person, a permanent impairment of a physical, intellectual, or sensory function, which results in restricted, or lack of, ability to perform an activity in the manner, or within the range, considered normal for a human being.
- 2.5 **“Historically Disadvantaged Individual (HDI)”** means a South African citizen:
- who, due to the apartheid policy that had been in place, had no franchise in national elections prior to the introduction of the Constitution of the Republic of South Africa Act 110 of 1983 or the Constitution of the Republic of South Africa Act 200 of 1993 (“the Interim Constitution”); and / or
  - who is a female; and / or
  - who has a disability;
- Provided that a person who obtained South Africa citizenship on or after the coming into effect of the Interim Constitution is deemed not to be an HDI.
- 2.6 **“Locality”** means a business enterprise located within the boundaries of Nkangala District Municipality to score points for locality.
- 2.7 **“Reconstruction and development Programme as published in Government Gazette No. 16085 dated 23 November 1994”** means in terms of Section 2(1) of the PPPFA of 2000 an organ of state must implement the programmes of the RDP and provide for points to be awarded for specific goals. In particular, some of the RDP goals that need to be considered in developing the Preferential Procurement policies include:
- Previously Disadvantaged Individuals;
  - Women;
  - Disabled Persons;
  - Youth; and
  - Local Labour.

- 2.8 **“specific goals”** means specific goals as contemplated in section 2(1)(d) of the Act which may include contracting with persons, or categories of persons, historically disadvantaged by unfair discrimination on the basis of race, gender and disability including the implementation of programmes of the Reconstruction and development Programme as published in Government Gazette No. 16085 dated 23 November 1994;
- 2.9 **“Targeted Enterprises”** means those enterprises (suppliers, manufacturers, service providers or construction works contractors) that own, operate or maintain premises within the target area defined in the contract, for the purposes of carrying out their normal business operations.
- 2.10 **“Targeted Labour”** means those individuals employed by a contractor, or sub-contractor, in the performance of a contract, who are defined in the contract as the target group, and who permanently reside in the defined target area.
- 2.11 **“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;
- 2.12 **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- 2.13 **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- 2.14 **“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
- 2.15 **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000)
- 2.16 **“Women equity”** means an organisation or company which has at least twenty five percent of women ownership.
- 2.17 **“Youth”** means persons between the ages of 14 and 35.

### 3. **FORMULAE FOR PROCUREMENT**

#### 3.1 **POINTS AWARDED FOR PRICE**

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

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

**80/20**

**or**

**90/10**

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

Where

$P_s$  = Points scored for comparative price of bid under consideration

$P_t$  = Comparative price of bid under consideration

$P_{\min}$  = Comparative price of lowest acceptable bid

#### 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 bid. For the purposes of this bid, the bidder will be allocated points based on the goals stated in table below as may be supported by proof/ documentation stated in the conditions of this bid:

The specific goals allocated points in terms of this tender	Number of points Allocated (80/20 system) (To be completed by the organ of state)		Number of points claimed (80/20 system) (To be completed by the tenderer)
HDI	30%	6	
Gender	30%	6	
Disability	30%	6	
Local Labour	5%	1	
Youth	5%	1	

#### 4.2 SPECIFIC GOALS CLAIM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022:

##### 4.2.1 NOTE 1 – HDI IN TERMS OF PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT NO. OF 2000, CLAUSE 2.1(d)

It must be noted that a total points of **30%** are obtainable in relation to the requirements as mentioned on the table above. Proof of in the form of **Ownership Information** contained in the **Central Supplier Database (CSD)** full report. Failure to submit evidential supporting documents (**refer to Note: 1**) is not an eliminating factor BUT a zero point will be scored.

Category	Specific goals points
51% - 100% HDI owned companies	30%
11% - 50% HDI owned companies	15%
0% - 10% HDI owned companies	0%

**NOTE 2 - GENDER IN TERMS OF PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT NO. OF 2000, CLAUSE 2.1(d)**

It must be noted that a total points of **30%** are obtainable in relation to the requirements as mentioned on the table above. Proof of in the form of **Ownership Information** contained in the **Central Supplier Database (CSD)** full report. Failure to submit evidential supporting documents (refer to Note: 2) is not an eliminating factor BUT a zero point will be scored.

Category	Specific goals points
51% - 100% women owned companies	30%
11% - 50% women owned companies	15%
0% - 10% women owned companies	0%

**NOTE 3 – PEOPLE LIVING WITH DISABILITIES IN TERMS OF PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT NO. OF 2000, CLAUSE 2.1(d)**

It must be noted that a total points of **30%** are obtainable in relation to the requirements as mentioned on the table above. Proof of in the form of **Ownership Information** contained in the **Central Supplier Database (CSD)** full report. Failure to submit evidential supporting documents (refer to Note: 3) is not an eliminating factor BUT a zero point will be scored.

Category	Specific goals points
51% - 100% companies owned by people living with disabilities	30%
11% - 50% companies owned by people living with disabilities	15%
0% - 10% companies owned by people living with disabilities	0%

**NOTE 4 – YOUTH IN TERMS OF RECONSTRUCTION AND DEVELOPMENT PROGRAMME (RDP)**

It must be noted that a total points of **5%** are obtainable in relation to the requirements as mentioned on the table above. Proof of in the form of **Ownership Information** contained in the **Central Supplier Database (CSD)** full report. Failure to submit evidential supporting documents (refer to Note: 4) is not an eliminating factor BUT a zero point will be scored.

Category	Specific goals points
51% - 100% youth owned companies	5%
11% - 50% youth owned companies	2.5%
0% - 10% youth owned companies	0%

**NOTE 5 – COMPANIES RESIDING WITHIN NDM IN TERMS OF RECONSTRUCTION AND DEVELOPMENT PROGRAMME (RDP)**

It must be noted that a total points of **5%** are obtainable in relation to the requirements as mentioned on the table above. Proof of in the form of **Ownership Information** contained in the **Central Supplier Database (CSD)** full report. Failure to submit evidential supporting documents (refer to Note: 5) is not an eliminating factor BUT a zero point will be scored.

Category	Specific goals points
Companies residing within NDM	5%
Companies residing within the province	2.5%
Companies outside the province	0%

## DECLARATION WITH REGARD TO COMPANY/FIRM

4.3 Name of firm:.....

4.4 VAT registration number.....

4.5 Company registration number:.....

4.6 **TYPE OF FIRM** ( Tick Applicable Box)

☐

Partnership/ Joint Venture/ Consortium

☐

One Person business/ sole propriety

☐

Close Corporation

☐

Company

☐

(Pty) Ltd

☐

Other : Specify

4.7 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 bid, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- 4.8
- The information furnished is true and correct;
  - The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
  - 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;
  - 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.

**WITNESSES:**

1. ....

1. ....

.....  
SIGNATURE(S) OF BIDDER(S)

DATE:

ADDRESS:

**FORM F: DECLARATION OF INTEREST**

**MBD 4**

1. **No bid will be accepted from persons in the service of the state<sup>1</sup>.**
2. Any person, having a kinship with persons in the service of the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid. In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons connected with or related to persons in service of the state, it is required that the bidder or their authorised representative declare their position in relation to the evaluating/adjudicating authority.
- 3 **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**

3.1 Full Name of bidder or his or her representative:.....

3.2 Identity Number: .....

3.3 Position occupied in the Company (director, trustee, shareholder<sup>2</sup>):.....

3.4 Company Registration Number:.....

3.5 Tax Reference Number:.....

3.6 VAT Registration Number.....

3.7 The names of all directors / trustees / shareholders members, their individual identity numbers and state employee numbers must be indicated in paragraph 4 below.

3.8 Are you presently in the service of the state? **YES / NO**

3.8.1 If yes, furnish particulars.....

.....

<sup>1</sup>MSCM Regulations: "in the service of the state" means to be –

- (a) a member of –
  - (i) any municipal council;
  - (ii) any provincial legislature; or
  - (iii) the national Assembly or the national Council of provinces;
- (b) a member of the board of directors of any municipal entity;
- (c) an official of any municipality or municipal entity;
- (d) an employee of any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No.1 of 1999);

- (e) a member of the accounting authority of any national or provincial public entity; or
- (f) an employee of Parliament or a provincial legislature.

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

3.9Have you been in the service of the state for the past twelve months? .....YES / NO

3.9.1Ifyes, furnish particulars.....

.....

3.10 Do you have any relationship (family, friend, other) with persons in the service of the state and who may be involved with the evaluation and or adjudication of this bid?.....YES / NO

3.10.1Ifyes, furnish particulars.

.....

.....

3.11 Are you, aware of any relationship (family, friend, other) between any other bidder and any persons in the service of the state who may be involved with the evaluation and or adjudication of this bid? YES / NO

3.11.1Ifyes, furnish particulars

.....

.....

3.12 Are any of the company’s directors, trustees, managers, principal shareholders or stakeholders in service of the state? YES / NO

3.12.1 If yes, furnish particulars.

.....

.....

3.13 Are any spouse, child or parent of the company’s directors, trustees, managers, Principal shareholders or stakeholders in service of the state? YES / NO

3.13.1Ifyes, furnish particulars.

.....

.....

3.14 Do you or any of the directors, trustees, managers, principle shareholders, or stakeholders of this company have any interest in any other related companies or business whether or not they are bidding for this contract. **YES / NO**

3.14.1 If yes, furnish particulars:

.....  
.....

4. Full details of directors / trustees / members / shareholders.

Full Name	Identity Number	State Employee Number

DECLARATION

I, the undersigned (name): ..... certify that the information furnished is correct. I accept that the state may act against me in terms of paragraph 23 of the General Conditions of Contract should this declaration prove to be false.

.....  
Signature

.....  
Date

.....  
Capacity

.....  
Name of Bidder

**FORM G: FINANCIAL REFERENCES****DETAILS OF TENDERERS BANKING INFORMATION****Notes to tenderer:**

1. The tenderer shall attach to this form an original or a copy of a letter from the bank not older than three (3) months confirming the bank account and details. Failure to provide the required letter with the tender submission shall render the tenderer's offer unresponsive.
2. The tenderer's banking details as they appear below shall be completed.
3. In the event that the tenderer is a joint venture enterprise, details of all the members of the joint venture shall be similarly provided and attached to this form.

<b>BANK NAME:</b>									
<b>ACCOUNT NAME:</b> (e.g. ABC Civil Construction cc)									
<b>ACCOUNT TYPE:</b> (e.g. Savings, Cheque etc)									
<b>ACCOUNT NO:</b>									
<b>ADDRESS OF BANK:</b>									
<b>CONTACT PERSON:</b>									
<b>TEL. NO. OF BANK / CONTACT:</b>									
How long has this account been in existence:	<table border="1"><tr><td>0-6 months</td><td></td></tr><tr><td>7-12 months</td><td></td></tr><tr><td>13-24 months</td><td></td></tr><tr><td>More than 24 months</td><td></td></tr></table> (Tick which is appropriate)	0-6 months		7-12 months		13-24 months		More than 24 months	
0-6 months									
7-12 months									
13-24 months									
More than 24 months									

Name of Tenderer: .....

Date: .....

Signature: .....

Full name of signatory: .....

**ATTACH HERETO A STAMPED COPY OF A LETTER FROM BANK TO  
THIS PAGE NOT OLDER THAN THREE (3) MONTHS**

## FORM H: CERTIFICATE OF INDEPENDENT BID DETERMINATION

- . This Municipal Bidding Document (MBD) must form part of all bids<sup>1</sup> invited.
- 2 Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by, firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging).<sup>2</sup> Collusive bidding is a *pe se* prohibition meaning that it cannot be justified under any grounds.
- 3 Municipal Supply Regulation 38 (1) prescribes that a supply chain management policy must provide measures for the combating of abuse of the supply chain management system, and must enable the accounting officer, among others, to:
- a. take all reasonable steps to prevent such abuse;
  - b. reject the bid of any bidder if that bidder or any of its directors has abused the supply chain management system of the municipality or municipal entity or has committed any improper conduct in relation to such system; and
  - c. cancel a contract awarded to a person if the person committed any corrupt or fraudulent act during the bidding process or the execution of the contract.
- 4 This MBD serves as a certificate of declaration that would be used by institutions to ensure that, when bids are considered, reasonable steps are taken to prevent any form of bid-rigging.
- 5 In order to give effect to the above, the attached Certificate of Bid Determination (MBD 9) must be completed and submitted with the bid:

<sup>1</sup> Includes price quotations, advertised competitive bids, limited bids and proposals.

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

### CERTIFICATE OF INDEPENDENT BID DETERMINATION

I, the undersigned, in submitting the accompanying bid:

---

(Bid Number and Description)

in response to the invitation for the bid made by:

---

(Name of Municipality / Municipal Entity)

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

I certify, on behalf

of: \_\_\_\_\_ that:

(Name of Bidder)

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign, the bid, on behalf of the bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:
  - (a) has been requested to submit a bid in response to this bid invitation;
  - (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
  - (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder
6. The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However communication between partners in a joint venture or consortium<sup>3</sup> will not be construed as collusive bidding.

7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
- (a) prices;
  - (b) geographical area where product or service will be rendered (market allocation)
  - (c) methods, factors or formulas used to calculate prices;
  - (d) the intention or decision to submit or not to submit, a bid;
  - (e) the submission of a bid which does not meet the specifications and conditions of the bid; or
  - (f) bidding with the intention not to win the bid.
8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.
9. The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

<sup>3</sup> Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

10. I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2005 or any other applicable legislation.

.....  
Signature

.....  
Date

.....  
Position

.....  
Name of Bidder

**FORM I: MUNICIPAL UTILITY ACCOUNT**

**DECLARATION BY THE TENDERER**

I the undersigned \_\_\_\_\_, has been duly

authorized to sign all documents with the Tender for Contract Number \_\_\_\_\_ on behalf of

\_\_\_\_\_ hereby make a declaration as follows:  
(referred to herein as "the Bidder")

1. I declare that the bidder and /or any of its director(s) / member(s) does not owe the municipality, or any other municipality and/or municipal entity any amount which is in arrears in respect of any municipal rates and taxes or municipal service charges.
2. I understand and accept that in the event that this declaration is proved to be false, the bid shall be rejected forthwith. All other rights of the municipality (including but not limited to the right to claim damages where applicable) shall remain reserved in full.

SIGNED ON BEHALF OF THE COMPANY

\_\_\_\_\_

IN HIS CAPACITY AS

\_\_\_\_\_

DATE

\_\_\_\_\_

FULL NAMES OF SIGNATORY

\_\_\_\_\_

UTILITY ACCOUNT NUMBER	NAME OF MUNICIPALITY	NAME OF OWNER

**ATTACH AN ORIGINAL OR A COPY OF A MUNICIPAL UTILITY  
ACCOUNT (NOT OLDER THAN THREE (3) MONTHS)**

**Important: Note the following**

- List and attach Account(s) registered all in the name(s) of the Director(s) **OR** the Company on the declaration form attached hereto; **OR**
- Attach a copy Lease Agreement along with the utility account of the Landlord, whereby the company is leasing the property its operating from.

**FORM J: PROOF OF REGISTRATION WITH PROFESSIONAL BODIES**

**AFFIX PROOF OF REGISTRATION WITH THE REQUIRED PROFESSIONAL  
BODY AS PER THE ELIGIBILITY CRITERIA**

**FORM K: PROFESSIONAL INDEMNITY INSURANCE**

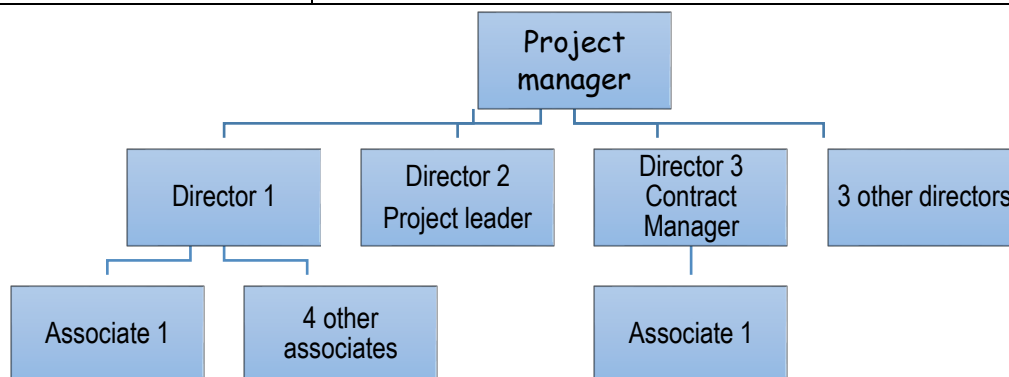
**AFFIX PROOF OF PROFESSIONAL INDEMNITY INSURANCE FROM RECOGNISED  
FINANCIAL INSTITUTION**

## FORM L: TENDERER'S PROJECT STRUCTURE

### Notes to tenderer:

1. The intention of this form is to demonstrate the tenderer's project structure, as well as the lines of responsibility between members of the project team and between the project team and the overall company structure. The tenderer must attach his own organogram to this form.
2. Tenderers which are large companies may simplify the organogram by 'rolling up' portfolios e.g. combining directors/associates into one box of the organogram. However, the individual positions of the key personnel within the structure must still be shown.
3. Joint Venture tenders will require each element of the venture to submit separate organograms that show the individual structure of each member company and the lines of responsibility of the proposed personnel involved in the project. In addition, there must also be a combined organogram that indicates how the joint venture itself will function and the proposed share of the work. Joint Venture tenderers shall note that the share of work indicated will be used in the analysis of such a tenderers preference proposed on returnable form D1, and that if awarded the share of work shall become a contractual obligation between the members of the joint venture.
4. State the city or town where the company's head office is located. The locality of regional or satellite office, regardless of degree of autonomy or size is not required. Only submit the number of offices other than the head office. Do not count offices outside RSA
5. Registered professional engineers, technicians or technologists' means those who are involved in the built industry as well as allied fields such as environmental professionals. Registered professionals of other disciplines (e.g. mechanical) are considered as employees only.

<b>Head Office:</b>	
<b>Other Offices:</b>	
<b>Registered Professionals:</b>	
<b>Total Employees :</b>	
<b>%share in JV agreement</b>	



SIGNED ON BEHALF OF THE TENDERER:.....

**FORM M: PROPOSED KEY PERSONNEL**

The Tenderer shall list below the key personnel whom he proposes to employ on the project should his Tender be accepted,

No	Name	Qualification	Designation for the project tendered for

Provide two paged CV of Each key Personnel to be used in this project.

Each CV should give at least the following:

- Position in the firm and within the organisation of this assignment
- PDI Status (describing population group, gender and disabilities)
- Proof of Educational qualifications
- Proof of Professional Registrations
- Relevant experience (actual duties performed, involvement and responsibility), including locations, dates and durations of assignments, starting with the latest.
- Language proficiency and
- References (company name, individual name, position held, contact details)

***(Affix the CV's and Attachments in a form of a booklet to the following Page.)***

**ATTACH CV'S OF KEY PERSONNEL TO THIS PAGE**

**FORM N: SCHEDULE OF PREVIOUS EXPERIENCE**

The procedure for the evaluation of responsive Bids will be on the average of the **previous projects** where the firm was involved. Reference of clients **MUST** be provided.

Evaluation of the Quotation's position in terms of his previous experience. Emphasis will be placed on the following:

- Experience of contracts of similar size
- At least three of the references will be contacted to obtain their input.

Provide the following information on relevant previous experience (indicate specifically projects of similar or larger size and/or which is similar with regard to type of work. **This information is material to the award of the Contract.**

Description	Value (R) VAT excluded	Period work executed		Reference		
		Appointment Date	Completion Date	Name	Organisation	Tel no

**FORM O: SCHEDULE OF CURRENT PROJECTS**

Provide the following information on current projects

**This information is material to the award of the Contract.**

Description	Value (R) VAT excluded	Appointment Date	Expected Completion Date	Reference		
				Name	Organisation	Tel no

**FORM P: SCHEDULE OF PROPOSED SUB-CONSULTANT**

Are / Do you have sub-contractors?

YES	NO
-----	----

If yes, complete the below

NAME OF SUB-CONTRACTOR	FULL DESCRIPTION OF WORK TO BE PERFORMED BY SUB-CONTRACTOR

**FORM Q: DECLARATION OF TENDERER'S LITIGATION HISTORY**

Does the tenderer have any litigation with which tenderer (including its directors, shareholders or other senior members in previous companies) have been involved with any organ of state or state department within the last ten years?

**YES****NO**

If yes, furnish your details in table below.

**NB: It is compulsory for all bidders to sign this form**

The tenderer shall list below details of any litigation with which the tenderer (including its directors, shareholders or other senior members in previous companies) has been involved with any organ of state or state department within the last ten years. The details must include the year, the litigating parties, the subject matter of the dispute, the value of any award or estimated award if the litigation is current and in whose favour the award, if any, was made.

CLIENT	OTHER LITIGATING PARTY	DISPUTE	AWARD VALUE	DATE RESOLVED

.....  
Signature.....  
Date.....  
Position.....  
Name of Bidder

**FORM C.1.1****FORM OF OFFER****OFFER**

The Employer, identified in the Acceptance signature block, has solicited offers to enter into a contract in respect of the following works:

**QUOTATION NO: FIN/005/02/2024 – APPOINTMENT OF A PROFESSIONAL ACTUARIAL VALUER TO COMPILE LONG SERVICE AWARD LIABILITY (LSA) AND POST EMPLOYMENT MEDICAL AID SUBSIDY LIABILITY (PEMA) IN TERMS OF GRAP 25 (AS AND WHEN REQUIRED) RE-ADVERT**

The Tenderer, identified in the Offer signature block below, has examined the documents listed in the Tender Data and addenda thereto as listed in the Tender Schedules, and by submitting this Offer has accepted the Conditions of Tender. By the representative of the Tenderer, deemed to be duly authorized, signing this part of this Form of Offer and Acceptance, the Tenderer offers to perform all of the obligations and liabilities of the Contractor under the Contract including compliance with all its terms and conditions according to their true intent and meaning for an amount to be determined in accordance with the Conditions of Contract identified in the Contract Data.

**THE SUB-TOTAL OF THE PRICES EXCLUSIVE OF VALUE ADDED TAX IS**

.....

..... Rand (in words); R ..... (In figures).

**THE OFFERED TOTAL OF THE PRICES INCLUSIVE OF VALUE ADDED TAX IS**

.....

..... Rand (in words); R ..... (In figures).

This Offer may be accepted by the Employer by signing the Acceptance part of this Form of Offer and Acceptance and returning one copy of this document to the Tenderer before the end of the period of validity stated in the Tender Data, whereupon the Tenderer becomes the party named as the Contractor in the Conditions of Contract identified in the Contract Data.

Signature(s): \_\_\_\_\_

Name(s): \_\_\_\_\_

Capacity: \_\_\_\_\_

For the tenderer \_\_\_\_\_  
(Name and address of Organisation)

Name & Signature

Of Witness

\_\_\_\_\_  
Name

\_\_\_\_\_  
Date

## BILL OF QUANTITIES

QUOTATION NO: FIN/005/02/2024

APPOINTMENT OF A PROFESSIONAL ACTUARIAL VALUER TO COMPILE LONG SERVICE AWARD LIABILITY (LSA) AND POST EMPLOYMENT MEDICAL AID SUBSIDY LIABILITY (PEMA) IN TERMS OF GRAP 25 (AS AND WHEN REQUIRED) RE-ADVERT

NO	ITEM DESCRIPTION	QTY	UNIT PRICE (R)	TOTAL (R)
1.	Report detailing the analysis of the actuarial valuation on the post-retirement assistance.	01		
2.	Report provision for long service liability in terms of GRAP standards.	01		
SUB-TOTAL				
VAT@15%				
TOTAL				

**TOTAL AMOUNT TO BE FORWARDED TO FORM OF OFFER**

## SCOPE OF WORK

### **APPOINTMENT OF A PROFESSIONAL ACTUARIAL VALUER TO COMPILE LONG SERVICE AWARD LIABILITY (LSA) AND POST EMPLOYMENT MEDICAL AID SUBSIDY LIABILITY (PEMA) IN TERMS OF GRAP 25 (AS AND WHEN REQUIRED) RE-ADVERT**

The Scope of Work is as follows:

The following support services will be required during the review of the Nkangala District Municipality for 3 Annual Financial Statements:

#### **1. PHASE A – MOBILISATION**

- Establish a Steering Committee that comprises representatives of key stakeholders, anticipating that it would include the following:
  - Project director
  - A senior representative or representatives from the municipality
  - The project manager
  - And, when required, Strategic Advisors.
- Confirm with the Steering Committee the :
  - Terms of Reference for our involvement as well as that of the municipality
  - The detailed project plan, including the allocation of roles and responsibilities.
  - Agree on the Project Charter
  - Obtaining sign-off by the municipality.
- Confirm the boundaries scope and required outputs of the Phase and identify the critical success factors that will guide the work of the project team.
- Confirm the data base fields and agree on the data capture conventions to ensure compatibility and transferability to Municipal systems.
- Determine which officials of the Municipality and other sources would have data relating to your project relevant to the Phase.
- Establish the names of the contact persons and their contact details.
- Arrange for a formal notification to be sent to every contact person, advising them of the project, enlisting their co-operation and ensuring their availability.

#### **2. PHASE B – EXECUTION**

- Review GRAP compliant annual financial statement for the year ending 30 June 2020,/2021 and 2022 using Caseware.
- Review all supporting schedules in relation of GRAP, iG RAP and directives, using Caseware and the mSCOA as regulated

- Review of Accounting policies
- Review of accounting methodologies in relation to relevant schedules as may be needed
- Review and recommend changes to chart of accounts so that it is in compliance with GRAP
- Review of key reconciliations and control accounts for the purpose of preparation of AFS
- Review of Reconciliations of general ledger to the following but not limited to:
  - Asset register, Lease register and Creditors register
  - Bank reconciliations, VAT Reconciliations (Review)
  - Salaries reconciliation
- Review of audit file
- Review of mSCOA transactions for the financial year

### **3. NDM SPECIFIC REQUIREMENTS FROM MUNSOFT**

- Ensure that finance personnel understands the process of AFS preparation using Caseware software.
- Ensure that the timelines as indicated in the NDM AFS approved preparation plan are adhered to
- Involvement of finance personnel at all times during the review of the AFS and documentation as required as part of the review of the AFS and schedules.

### **4. AVAILABILITY AND DATE ON WHICH PROJECT WILL COMMENCE**

- The project team should be available from 1 August to 30 August every financial year.

### **5. PHASE C – FINALISATION**

- Submission of the draft and final review notes before the agreed deadlines.
- Compile close out report of the project.