



# TENDER DOCUMENT

| Project Name  | Project Number       |
|---|----------------------|
| APPOINTMENT OF TRANSACTIONAL ADVISORY FOR TSWELOPELE LOCAL MUNIICIPALITY FOR PERIOD ENDING 30 JUNE 2027 | SCM/TSW/04/2024-2025 |

**Contact : Ms Puseletso Mashiane**

**Tel : (051) 8531111 Fax : (051)8531332 (during office hours)**

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

**Amount (vat inclusive).....**

**Address.....**

.....

.....

**Contact Number.....**

**E-mail Address.....**

**Closing date: 22 July 2024, 12H00**

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**VERY IMPORTANT NOTICE ON DISQUALIFICATIONS:**

**BY SUBMITTING THE BID THE BIDDER UNDERTAKES TO ABIDE BY THE TERMS AND CONDITIONS OF THIS TENDER INCLUDING BUT NOT LIMITED TO THE RULES OUTLINED BELOW**

- A bid not complying with the requirements stated hereunder will be regarded as not being an “Acceptable bid”, and as such will be rejected.
- “Acceptable bid” means any bid which, in all respects, complies with the conditions of bid and specifications as set out in the bid documents, including conditions as specified in the Preferential Procurement Policy Framework Act (Act 5 of 2000) and related legislation and regulations, in terms of which provision is made for this policy.
- In this document and other documents referred to but not attached, the following words are synonymous with each other.
  - a. CLIENT, EMPLOYER, TSWELOPELE LOCAL MUNICIPALITY.
  - b. BID, TENDER AND VARIATIONS THEREOF
  - c. JOINT VENTURE / CONSORTIUM
  - d. TENDERER, BIDDER, CONTRACTOR
- The prices or rates quoted in the Schedule of Quantities shall be deemed to include for all costs, including materials, plant, labour, patent rights and royalties, freight, insurance, customs and delivery to the construction site, unless otherwise stated by the tenderer in writing and clearly noted in the Returnable Schedules, Form 2.1.8: Amendments and Qualifications by Tenderer.
- Unless otherwise stipulated in a letter accompanying the tender, the tenderer shall be deemed to have waived, renounced and abandoned any conditions printed or written upon any stationery used for the purpose of or in connection with the submission of the tender, which are in conflict with the Council’s conditions of tender and the Conditions of Contract. The tenderer is warned that any material divergence from the official conditions or specifications may render the tender liable to disqualification.
- In the case of a tenderer withdrawing the tender before expiry of the aforesaid period of three calendar months, the Council may refuse to receive or consider for such period as it may think fit, any further tenders from that tenderer.
- The Council does not bind itself to accept the lowest or any tender and reserves the right to accept the whole or any part of a tender.

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# TSWELOPELE

LOCAL MUNICIPALITY  
A MUNICIPALITY IN PROGRESS

- Appeals and/or Objections- Any Service Provider aggrieved by decisions or actions taken by the Municipality may lodge within fourteen (14) calendar days of the date of the decision or action, a written objection or complaint to the Municipal Manager.

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Account Holder: \_\_\_\_\_

Bank: \_\_\_\_\_

Branch: \_\_\_\_\_

Account Type: \_\_\_\_\_

Account Number: \_\_\_\_\_

Branch Code: \_\_\_\_\_ Bank Rating \_\_\_\_\_

Date Bank stamp

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**CONFIRMATION OF BANKING DETAILS BY BANK OFFICIAL**

Surname : \_\_\_\_\_

Designation of the official 

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Bank fax no 

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E-mail address \_\_\_\_\_

\_\_\_\_\_  
 SIGNATURE OF THE BANK OFFICIAL: \_\_\_\_\_  
 Date

Addition Financial Accounts:

| Name of Financial Institution | Type of Account | Account Number | Bank Rating |
|-------------------------------|-----------------|----------------|-------------|
|                               |                 |                |             |

**1. FULL DESCRIPTION OF THE TENDER**

APPOINTMENT OF TRANSACTIONAL ADVISORY FOR TSWELOPELE LOCAL MUNIICPALITY FOR PERIOD ENDING 30 JUNE 2027 - SCM/TSW/04/2024-2025

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## 1.1 RULES FOR BIDDING

- 1.1.1. The municipality is not bound to accept any of the proposals submitted and reserves the right to call for presentations from short-listed bidders before final selection.
- 1.1.2. Documents submitted by bidders will not be returned. The municipality reserves the right to return late bid submission unopened.
- 1.1.3. The municipality reserves the right to terminate this appointment or temporarily defer the work, or any part thereof, at any stage of completion should the municipality decide not to proceed with the bid.
- 1.1.4. The service provider must be a single legal entity with all other necessary expertise secured via sub-contract, or under a joint venture arrangement.
- 1.1.5. The bidding entity shall be the same entity that will execute the bid. Any bid found to be fronting for another entity or entities shall be disqualified immediately.
- 1.1.6. Bidders may ask for clarification on these bid documents or any part thereof up to close of business week before the deadline for the submission of the bids.
- 1.1.7. Bidders may not contact the municipality on any matter pertaining to their bid from the time when the bids are submitted to the time the contract is awarded. Any effort by a bidder to influence bid evaluation, bid comparisons or bid award decisions in any manner, may result in rejection of the bid concerned.
- 1.1.8. The total bid price will be paid upon submission of progress report and invoices.
- 1.1.9. Bidders must comply with all requirements particularly conditions of work as per sectoral determination.
- 1.1.10. Bidders must have existing resources to be able to provide the service.
- 1.1.11. Should the contract between the municipality and the service provider be terminated by either party due to reasons not attributable to the service provider, the service provider will be remunerated for the appropriate portion of work completed up to a maximum amount of not more than the total fee bid by the service provider for the appropriate phase of the project during which the appointment was terminated.
- 1.1.12. Bidders must attach proof of third party insurance including proof of parties involved in the joint venture,

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- 1.1.13. Bidders should not scratch out without initialling next to the amended rates or information, affecting the evaluation of the bid.
- 1.1.14. The Bid document must be properly signed by a party having the authority to do so, according to the example of “Authority or Signatory”.
- 1.1.15. Evidence that the municipal rates and taxes or municipal charges owed by the bidder or any of its directors to the municipality or municipal entity, or to any other municipality or municipal entity, are not in arrears for more than three months, in terms of lease agreement, proof that Municipal charges (lessor) owed on the premises are not in arrears for more than 90 days must be attached, lease agreement alone will not be accepted.
- 1.1.16. Bidders will be disqualified if any bidders who during the last five years has failed to perform satisfactorily on a previous contract with the municipality, municipal entity or any other organ of state after a reasonable written notice was given to that bidder that performance was unsatisfactory or appears on the register / database of defaulters.
- 1.1.17. The Accounting officer must ensure that irrespective of the procurement process followed, no award may be given to a person –
- 1.1.17.1 Who is in the service of the state, or;
  - 1.1.17.2 If that person is not a natural person, of which any Director, Manager, Principal Shareholder or Stakeholder, is a person in the service of the state; or;
  - 1.1.17.3 Who is an advisor or consultant contracted with the municipality in respect of contract that would cause a conflict of interest?
- 1.1.18 Failure to provide, **letter of good standing with SARS and inability to prove that the Municipal rates and taxes are not in arrears for more 90 days as required in the bid documentation will lead to bidder not being advanced to the next stage of evaluation.**
- 1.1.19 Bid offers will be rejected if the bidder or any of his/ her directors is listed on the Register of Bid Defaulters in terms of the Prevention and Combating of Corrupt Activities Act of 2004 as a person prohibited from doing business with the public sector,
- 1.1.20 Failure by the bidder to disclose with the bid submission any form of conflict of interest including disclosure on a person(s) who is in the service of the state or any immediate blood relative in the service of the state will lead to disqualification.

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1.1.21 **All functionality and all other returnables will be exposed to verification process, and any returnable proven to be a fake document, the bidders document will be rejected or subjected to disqualification.**

1.1.22 The municipality is not liable for any documents delivered via courier companies and by post. No official is going to sign the receipt of the tender document, all courier tenders must be delivered in the tender box situated at Reception Area, 01 Bosman Street, Civic Centre, Bultfontein,9670 by the delivery man.

1.1.23 Tender documents must be submitted in a sealed envelope clearly marked with the project name and number.

1.1.24 Fully completed and signed tender documents must be deposited into the tender box located at: 01 Bosman Street, Civic Centre, Bultfontein,9670. The sealed envelope must specify the following:

- Bid number
- Closing Date and time
- The name and address of the tenderer

1.125 The Municipality has the right to enter into negotiation with a prospective service provider regarding any terms and conditions, including price(s), of a proposed contract.

**2. TRIBAL AUTHORITY /MUNICIPAL ACCOUNT DECLARATION FORM**

Proof that municipal rates and taxes are not in arrears

|   |                       |  |                                      |
|---|-----------------------|--|--------------------------------------|
| <b>Company Property / Account</b><br>(Attach recent municipal statement/lease agreement/letter from tribal authority) |                       |  |                                      |
| <b>Tribal Authority /Municipal Name / description /address</b>  | <b>Account Number</b> | <b>Property Owner / ID/ Account Type</b> | <b>Declaration Amount/ signature</b> |
| Name:   |                       | Account                                  | Amount                               |
| address   |                       | ID No:                                   | signature                            |
| Account Type  |                       |  |                                      |

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I, \_\_\_\_\_(Bidder name) declare that above account(s) are not in arrears & undertakes to settle all municipal account/ account tribal authority, authorize TLM to verify all municipal account / tribal authority account of a company; members/director (excluded are of employer/association member) and understand that if account(s) is in arrears shall decline our bid at any SCM process stage; we acknowledge that information furnish above is accurate/correct and if not may render our bid invalid (duly sign by above members/director on signature column

**SIGNATURE OF BIDDER:** \_\_\_\_\_ **DATE:** \_\_\_\_\_

**3. APPOINTMENT OF TRANSACTIONAL ADVISORY FOR TSWELOPELE LOCAL MUNIICPALITY FOR PERIOD ENDING 30 JUNE 2027**

|   |
|---|
| The Service provider must commit to give individual solution within the TLM’s internal policies with the necessary flexibility to fulfil TLM’s requirements as and when required              |
| The service provider will be required to provide operational business processes that are tailored to meet the location and service range as required by TLM, with the widest choice available |
| The Service Provider will also be required to continuously identify improvements in terms of cost and deliver innovative solution to TLM  |
| The service Provider must provide efficient, trained, capable compete and dedicated personnel and an account manager to perform the required service  |

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T2.2 Other Documents required for Bid Evaluation Purposes

T2.3 Returnable Schedules that will be incorporated in the Contract

**PART C1: PRICING DATA .....**

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- C1.1 Pricing Instructions
- C1.2 Bill of Quantities/Schedule of Activities
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**THE CONTRACT**

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- C3.3 Certificate of Authority for Signatory to Agreement In Terms of Occupational Health and Safety Act, 199 (Act no. 85 of 1993)

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**T1.1 BID NOTICE AND INVITATION TO BID**

PROJECT NAME: PROCUREMENT OF TRANSACTION ADVISORY SERVICES AT TSWELOPELE LOCAL MUNICIPALITY FOR A PERIOD OF ENDING 30 JUNE 2027-  
BID NO: SCM/TSW/04/2024-2025

Bids are hereby invited for the Procurement of Transaction Advisors at Tswelopele Local Municipality for a Period of Three Years. The minimum specifications are detailed in the Bid document. Bid documents will be available on [etender](#) from 05 July 2024. Enquiries should be addressed to Ms PJ Mashiane.

Completed bid documents are to be placed in a sealed envelope endorsed "PROCUREMENT OF TRANSACTION ADVISORY SERVICES AT TSWELOPELE LOCAL MUNICIPALITY SERVICES FOR A PERIOD OF ENDING 30 JUNE 2027.

All bids must be deposited in the Bid Box, at the offices of the Tswelopele Local Municipality, not later than 12h00 on 22 July 2024, at which time the bids will be opened in public.

Bidders to note that a Pre-Qualification Evaluation will be undertaken. The pre-qualification evaluation criteria and points are as follows:

Experience - 75 points  
Methodology - 25 points

A minimum score of 75 out of 100 points in total in the technical evaluation criteria must be scored in order to proceed to the Financial Evaluation.

Preferential Procurement Policy Framework of 2022, on 80/20 point system. Tenders will remain valid for 90 (ninety) days.

Specified Goals = ( race, gender, disability and Youth)

Online briefing session – 10 July 2024 – 12h00

<https://us06web.zoom.us/j/9032514747?pwd=UCBRJTdW0XdPIHgcWAE4JSwKLjrT9s.1&omn=81892225022>

Meeting ID: 903 251 4747

Passcode: 618418

NB: Bidders should rename the gadgets with the company name that they are representing

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**BID DATA**

The **Standard Conditions of Bid** makes several references to the bid data for details that apply specifically to this bid. The bid data shall have precedence in the interpretation of any ambiguity or inconsistency between it and the standard conditions of bid.

| <b>Clause</b>             | <b>Data</b>   |
|---------------------------|---|
| ACTIONS                   | The Employer is:<br>The Municipal Manager<br>Tswelopele Local Municipality<br>01 Bosman Street<br>Civic Centre<br>Bultfontein<br>9670   |
| ELIGIBILITY               | Companies that fit all the requirements of this bid as specified.   |
| CLARIFICATION MEETING     | Online briefing session – 10 July 2024 – 12h00<br><br><a href="https://us06web.zoom.us/j/9032514747?pwd=UCBRJTdW0XdPIHgcWAE4JSwKLjrT9s.1&amp;omn=81892225022">https://us06web.zoom.us/j/9032514747?pwd=UCBRJTdW0XdPIHgcWAE4JSwKLjrT9s.1&amp;omn=81892225022</a><br><br>Meeting ID: 903 251 4747<br>Passcode: 618418<br><br>NB: Bidders should rename the gadgets with the company name that they are representing |
| ALTERNATIVE TENDER OFFERS | <i>No alternative bid is to be accepted!</i>  |
| SUBMITTING A TENDER OFFER | The <b><u>whole original</u></b> bid document, <b>as issued by the Municipality</b> , shall be submitted. Bids may only be submitted on the Bid documentation issued by the municipality  |
| CLOSING TIME              | The closing time for submission of bid offers is:<br>Date: 22 July 2024<br>Time : <b>12H00</b><br>Telephonic, telegraphic, facsimile or e-mailed bid offers will <b>not</b> be accepted.  |

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|                       |  |
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| TENDER OFFER VALIDITY | <ol style="list-style-type: none"> <li>1. The employer will have up to 90 days (working days) from the closing date within which to consider submitted bids.</li> <li>2. The successful bidder will have up to 10 days to respond to the service offer.</li> </ol> |
|-----------------------|--|

| Clause                          | Data   |
|---------------------------------|--|
| INSPECTIONS, TESTS AND ANALYSIS | Access will be provided by the municipality for the inspection of the tenderer's offices if required.  |
| CERTIFICATES AND ATTACHMENTS    | <p>The bidder is required to attach the following <b>Valid documents</b> to the tender document:</p> <ol style="list-style-type: none"> <li>a. Proof of registration on Central Supplier Database [Last verified between the <b>date of advert</b> and the <b>closing date</b>] detailing all compliance requirements of the Bidder;</li> <li>b. Copy of up to date statement of municipal rates and taxes (not tax invoice) and municipal service charges (not older than a month from date of tender), if renting a lease agreement and owner's up to date proof of municipal rates. If the bidder is operating where municipal rates are not applicable, a certified copy of proof residence from the traditional authority must be submitted (not older than three months).</li> <li>c. Submit the above documents (a to c) for each company if bidding as a joint venture.</li> <li>d. Joint venture, consortium agreements (if applicable).</li> <li>e. Evaluation will take place as follows           <ul style="list-style-type: none"> <li>Stage 1: returnables</li> <li>Stage 2: Functionality</li> <li>Stage 3: Calculation of Preference points and specified goals.</li> </ul> </li> </ol> <p><b>Note:</b> Failure to attach the above documents will lead to automatic disqualification from further evaluation</p> |
| OPENING OF BID SUBMISSIONS      | There will be public opening of bids. The Municipality will publicise the tender opening register on the website: <a href="http://www.tswelopele.gov.za">www.tswelopele.gov.za</a> after the closing date.   |

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| TWO-ENVELOPE SYSTEM                          | A two-envelope procedure will <b>not</b> be followed.   |
| ARITHMETICAL ERRORS                          | <p>a) Where there is a discrepancy between the amounts in figures and in words, the amount in figures shall govern.</p> <p>b) If bills of quantities (or schedule of quantities or schedule of rates) apply and there is an error in the line item total resulting from the product of the unit rate and the quantity, <u>the rate shall govern and the line item total shall be corrected.</u></p> <p>c) Where there is an error in the total of the prices either as a result of corrections required by this checking process or in the tenderer's addition of</p> |
| <b>Clause</b>                                | <b>Data</b>   |
|  | <p>prices, the total of the prices shall be adjusted to reflect the arithmetically correct summation of corrected line item totals.</p> <p>Consider the rejection of a tender offer if the tenderer does not accept the correction of the arithmetical errors in the manner described above.</p>  |
| EVALUATION OF BID OFFERS                     | <p>The preference procedure for evaluation of responsive bid offers shall be the <b>80/20</b> point preference system.</p> <ul style="list-style-type: none"> <li>- where 80 points will be allocated in respect of price</li> <li>- 20 points will be allocated towards targeted goals (race, gender, Disability and Youth).</li> <li>- Note: All bids will be evaluated firstly on returnable compliance and functionality before the evaluation on 80/20 point system</li> </ul>   |
| ACCEPTANCE OF BID OFFER                      | Bids containing any one or more of the errors or omissions, or bids not having complied with any one of the required bid conditions shall not be considered and shall automatically be rejected.  |
| PROVIDE COPIES OF THE CONTRACTS              | The number of paper copies of the signed contract to be provided by Tswelopele Municipality is <b>one</b> .   |
| ADDITIONAL CONDITIONS APPLICABLE TO THIS BID | <p>The additional conditions of bid are:</p> <ol style="list-style-type: none"> <li>1 The Employer may also request that the bidder provide written evidence on the adequacy of financial, labour and other resources for carrying out the contract.</li> <li>2 <i>The Municipal shall confirm validity of all functionality documents attached with relevant person indicated, we may require Previous Purchase Orders or previous payments from the reference contact person indicated in the</i></li> </ol>  |

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|  | <p><i>returnable claiming functionality points. It will take 3 attempts for the Municipality to do so if the committee fails to confirm the validity of the returnable from the reference contact person such returnable will not be awarded a point.</i></p> <p>3 The Employer 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 bidder. The bidder shall provide all reasonable assistance in such investigations.</p> <p>4 The bidder shall be required to complete the Form of Offer and Acceptance (C1.1) and Bills of Quantity for all the regions as specified in the tender document.</p> <p>5 The bid document shall be submitted as a whole and <b>not</b> in parts.</p> <p>6 <b>List of returnable documents must be completed in full.</b><br/>(i.e.: A bidder's company profile <b>will not</b> be used by the TLM to complete on behalf of the bidder)</p> |
|--|---|

## **F.1 General**

### **F.1.1 Actions**

The employer and each tenderer submitting a tender offer shall comply with these conditions of tender. In their dealings with each other, they shall discharge their duties and obligations as set out in F.2 and F.3, timeously and with integrity, and behave equitably, honestly with openness and transparency.

### **F.1.2 Tender Documents**

The documents issued by the employer for the purpose of a tender offer are listed in the tender data.

### **F.1.3 Interpretation**

F.1.3.1. the tender data and additional requirements contained in the tender schedules that are included in the returnable documents are deemed to be part of these conditions of tender.

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F.1.3.2. these conditions of tender, the tender data and tender schedules which are only required for tender evaluation purposes, shall not form part of any contract arising from the invitation to tender.

F.1.3.3 For the purposes of these conditions for the calling of expressions of interest, the following definitions apply:

- a) Comparative offer means the tenderer's financial offer after the factors of non-firm prices, all unconditional discounts and any other tendered parameters that will affect the value of the financial offer have been taken into consideration
- b) Corrupt practice means the offering, giving, receiving or soliciting of anything of value to influence the action of the employer or his staff or agents in the tender process; and
- c) Fraudulent practice means the misrepresentation of the facts in order to influence the tender process or the award of a contract arising from a tender offer to the detriment of the employer, including collusive practices intended to establish prices at artificial levels.

#### **F.1.4 Communication and employer's agent**

Each communication between the employer and a tenderer shall be to or from the employer's agent only, and in a form that can be read, copied and recorded. Writing shall be in the English language. The employer shall not take any responsibility for non-receipt of communications from or by a tenderer. The name and contact details of the employer's agent are stated in the tender data.

#### **F.1.5 The employer's right to accept or reject any tender offer**

F.1.5.1 The employer may accept or reject any variation, deviation, tender offer, or alternative tender offer, and may cancel the tender process and reject all tender offers at any time before the formation of a contract. The employer shall not accept or incur any liability to a tenderer for such cancellation and rejection, but will give written reasons for such action upon written request to do so.

F.1.5.2 The employer may not, subsequent to the cancellation or abandonment of a tender process or the rejection of all responsive tender offers re-issue a tender covering substantially the same scope of work within a period of three months.

#### **F.2 Tenderer's obligations**

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**F.2.1 Eligibility**

Submit a tender offer only if the tenderer satisfies the criteria stated in the tender data and the tenderer, or any of his/ her principals, is not under any restriction to do business with the employer.

**F.2.2 Cost of tendering**

Accept that the employer will not compensate the tenderer for any costs incurred in the preparation and submission of a tender offer, including the costs of any testing necessary to demonstrate that aspects of the offer to satisfy requirements.

It is a term of this bid that the employer is indemnified from any liability arising or accruing from expenses or damages or losses incurred by the bidder including in the event the employer opts to cancel or discontinue the bidding process of this tender.

**F.2.3 Check documents**

Check the tender documents on receipt for completeness and notify the employer of any discrepancy or omission.

**F.2.4 Confidentiality and copyright of documents**

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.

**F.2.5 Reference documents**

Obtain, as necessary for submitting a tender offer, copies of the latest versions of standards, specifications, conditions of contract and other publications, which are not attached but which are incorporated into the tender documents by reference.

**F.2.6 Acknowledge addenda**

Acknowledge receipt of addenda to the tender documents, which the employer may issue, and if necessary apply for an extension to the closing time stated in the tender data, in order to take the addenda into account.

**F.2.7 Clarification meeting**

Attend, where required, a clarification meeting at which tenderers may familiarize themselves with aspects of the proposed work, services or supply and raise questions. Details of the meeting are stated in the tender data.

**F.2.8 Seek clarification**

Request clarification of the tender documents, if necessary, by notifying the employer at least five (5) working days before the closing date stated in the tender data.

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### **F.2.9 Insurance**

Be aware that the extent of insurance to be provided by the employer (if any) might not be for the full cover required in terms of the conditions of contract identified in the contract data. The tenderer is required to seek adequate cover for covering liability that may ensue during the contract term.

### **F.2.10 Pricing the tender offer**

F.2.10.1 Include in the rates, prices, and the tendered total of the prices (if any) all duties, taxes, Value Added Tax (VAT), and other levies payable to the successful tenderer, such duties, taxes and levies being those applicable fourteen (14) days before the closing time stated in the tender data.

F.2.10.2 Provide rates and prices that are fixed for the duration of the contract (36 months) inclusive of applicable projected escalation as provided for in the conditions of contract identified in the contract data and not subject to any further adjustment; payable on a monthly basis.

F.2.10.3 State the rates and prices in South African Rand only.

**F.2.10.4 The municipality has limited resources and bids must be competitive, with market related pricing, as this will be one of the deciding factors in the final award of the contract**

### **F.2.11 Alterations to documents**

Not make any alterations or additions to the tender documents, except to comply with instructions issued by the employer, or necessary to correct errors made by the tenderer. All signatories to the tender offer shall initial all such alterations. Erasures and the use of masking fluid are prohibited.

### **F.2.12 Alternative tender offers**

F.2.12.1 Submit alternative tender offers only if a main tender offer, strictly in accordance with all the requirements of the tender documents, is also submitted. The alternative tender offer is to be submitted with the main tender offer together with a schedule that compares the requirements of the tender documents with the alternative requirements of the tenderer proposes.

F.2.12.2 Accept that an alternative tender offer may be based only on the criteria stated in the tender data or criteria otherwise acceptable to the employer.

### **F.2.13 Submitting a tender offer**

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F.2.13.1 Submit a tender offer to provide the whole of the works, services or supply identified in the contract data and described in the scope of works, unless stated otherwise in the tender data.

F.2.13.2 Return all returnable documents to the employer after completing them in their entirety.

F.2.13.3 Submit the parts of the tender offer communicated on paper as an original plus the number of copies stated in the tender data, with an English translation of any documentation in a language other than English.

F.2.13.4 Sign the original copies of the tender offer where required in terms of the tender data. The employer will hold all authorized signatories liable on behalf of the tenderer. Signatories for tenderers proposing to contract as joint ventures shall state; which of the signatories is the lead partner whom the employer shall hold liable for the purpose of the tender offer.

F.2.13.5 Seal the original package marking the package as "ORIGINAL"

F.2.13.6 Seal the original tender offer package in an outer package that states on the outside only the employer's address and identification details as stated in the tender data.

F.2.13.7 Accept that the employer will not assume any responsibility for the misplacement or premature opening of the tender offer if the outer package is not sealed and marked as stated.

#### **F.2.14 Information and data to be completed in all respects**

Accept that tender offers, which do not provide all the data or information requested completely and in the form required, will be regarded by the employer as non-responsive.

#### **F.2.15 Closing Time**

F.2.15.1 Ensure that the employer receives the tender offer at the address specified in the tender data not later than the closing time stated in the tender data. Proof of posting shall not be accepted as proof of delivery. The employer shall not accept tender offers submitted by telegraph, facsimile or e-mail.

F.2.15.2 Accept that, if the employer extends the closing time stated in the tender data for any reason, the requirements of these conditions of tender apply equally to the extended deadline.

#### **F.2.16 Tender Offer Validity**

Initial here: \_\_\_\_\_



F.2.16.1 Hold the tender offer(s) valid for acceptance by the employer at any time during the validity period stated in the tender data after the closing time stated in the tender data.

F.2.16.2 If requested by the employer, consider extending the validity period stated in the tender data for an agreed additional period.

F.2.16.3 The contract will be valid for a period of three (3) years

It would be expected of the successful Service Provider to assume duty upon appointment on the date to be determined by the municipality.

### **F.2.17 Clarification of tender offer after submission**

Provide clarification of a tender offer in response to a request to do so from the employer during the evaluation of tender offers. This may include providing a breakdown of rates or prices and correction of arithmetical errors by the adjustment of certain rates or item prices (Or both).

No change in the competitive position of tenderers or substance of the tender offer is sought, offered, or permitted.

**Note: Sub-clause F.2.17 does not preclude the negotiation of the final terms of the contract with a preferred tenderer following a competitive selection process, should the Employer elect to do so.**

### **F.2.18 Provide other material**

F.2.18.1 Provide, on request by the employer, any other material that has a bearing on the tender offer, the tenderer's commercial position (including notarized joint venture agreements), referencing arrangements, or samples of materials, considered necessary by the employer for the purpose of a full and fair risk assessment. Should the tenderer not provide the material, or a satisfactory reason as to why it cannot be provided, by the time for submission stated in the employer's request, the employer may regard the tender offer as non-responsive.

### **F.2.19 Inspections, tests and analysis**

Provide access during working hours to premises for inspections, tests and analysis as provided for in the tender data.

### **F.2.20 Submit securities, bonds, policies, etc.**

Initial here: \_\_\_\_\_



If requested, submit for the employer's acceptance before formation of the contract, all securities, bonds, guarantees, policies and certificates of insurance required in terms of the conditions of contract identified in the contract data.

#### **F.2.21 Check final draft**

Check the final draft of the contract provided by the employer within the time available for the employer to issue the contract.

#### **F.2.22 Return of other tender documents**

If so instructed by the employer, return all retained tender documents within twenty eight (28) days after the expiry of the validity period stated in the tender data.

#### **F.2.23 Certificates**

Include in the tender submission or provide the employer with any certificates as stated in the tender data.

### **F.3 The employer's undertakings**

#### **F.3.1 Respond to clarification**

Respond to a request for clarification received up to five (5) working days before the tender closing time stated in the Tender Data and notify all tenderers who drew procurement documents.

#### **F.3.2 Issue Addenda**

If necessary, issue addenda that may amend or amplify the tender documents to each tenderer during the period from the date that tender documents are available until seven (7) days before the tender closing time stated in the Tender Data. If, as a result a tenderer applies for an extension to the closing time stated in the Tender Data, the Employer may grant such extension and, shall then notify all tenderers who drew documents.

#### **F.3.3 Return late tender offers**

Return tender offers received after the closing time stated in the Tender Data, unopened, (unless it is necessary to open a tender submission to obtain a forwarding address), to the tenderer concerned.

#### **F.3.4 Opening of tender submissions**

Initial here: \_\_\_\_\_



F.3.4.1 Unless the two-envelope system is to be followed, open valid tender submissions in the presence of tenderers' agents who choose to attend at the time and place stated in the tender data. Tender submissions for which acceptable reasons for withdrawal have been submitted will not be opened.

F.3.4.2 Announce at the meeting held immediately after the opening of tender submissions, at a venue indicated in the tender data, the name of each tenderer whose tender offer is opened, the total of his prices, preferences claimed and time for completion, if any, for the main tender offer only.

F.3.4.3 Make available the record outlined in F.3.4.2 to all interested persons upon request.

### **F.3.5 Two-envelope system**

F.3.5.1 Where stated in the tender data that a two-envelope system is to be followed, open only the technical proposal of valid tenders in the presence of tenderers' agents who choose to attend at the time and place stated in the tender data and announce the name of each tenderer whose technical proposal is opened.

F.3.5.2 Evaluate the quality of the technical proposals offered by tenderers, then advise tenderers who remain in contention for the award of the contract of the time and place when the financial proposals will be opened. Open only the financial proposals of tenderers, who score in the quality evaluation more than the minimum number of points for quality stated in the tender data, and announce the score obtained for the technical proposals and the total price and any preferences claimed. Return unopened financial proposals to tenderers whose technical proposals failed to achieve the minimum number of points for quality.

### **F.3.6 Non-disclosure**

Not disclose to tenderers, or to any other person not officially concerned with such processes, information relating to the evaluation and comparison of tender offers, the final evaluation price and recommendations for the award of a contract, until after the award of the contract to the successful tenderer.

### **F.3.7 Grounds for rejection and disqualification**

Determine whether there has been any effort by a tenderer to influence the processing of tender offers and instantly disqualify a tenderer (and his tender offer) if it is established that he engaged in corrupt or fraudulent practices.

### **F.3.8 Test for responsiveness**

Initial here: \_\_\_\_\_



F.3.8.1 Determine, after opening and before detailed evaluation, whether each tender offer properly received:

- a. Complies with the requirements of these Conditions of Tender,
- b. Has been properly and fully completed and signed, and
- c. Is responsive to the other requirements of the tender documents.

F.3.8.2 A responsive tender is one that conforms to all the terms, conditions, and specifications of the tender documents without material deviation or qualification. A material deviation or qualification is one which, in the Employer's opinion, would:

- a. Detrimentially affect the scope, quality, or performance of the works, services or supply identified in the Scope of Work,
- b. Change the Employer's or the tenderer's risks and responsibilities under the contract,
- c. Affect the competitive position of other tenderers presenting responsive tenders, if it were to be rectified.

### **F.3.9 Arithmetical errors**

F.3.9.1 Check responsive tender offers for arithmetical errors, correcting them in the following manner:

- a. Where there is a discrepancy between the amounts in figures and in words, the amount in figures shall govern.
- b. If bills of quantities (or schedule of quantities or schedule of rates) apply and there is an error in the line item total resulting from the product of the unit rate and the quantity, the rate shall govern and the total shall be corrected.
- c. Where there is an error in the total of the prices either as a result of other corrections required by this checking process or in the tenderer's addition of prices, the rate shall govern and the tenderer will be asked to revise selected item prices to achieve the tendered total of the prices.

F.3.9.2 Consider the rejection of a tender offer if the tenderer does not correct or accept the correction of his/ her arithmetical errors in the manner described in F.3.9.1.

### **F.3.10 Clarification of a tender offer**

Initial here: \_\_\_\_\_



Obtain clarification from a tenderer on any matter that could give rise to ambiguity in a contract arising from the tender offer.

### **F.3.11 EVALUATION METHODOLOGY**

- a. In addition to all items highlighted under Page 2 titled **“Very Important Notice on Disqualifications”**, the tenders will be evaluated in terms of the Municipality Supply Chain Management policy, Preferential Procurement Framework Act (Act 5 of 2000) and its regulations as enacted in 2001.
- b. Tenders will be evaluated using the 80/20 points allocation system. The total points out of a possible maximum of 100 will be calculated using various formulae to calculate price as well as for preferential procurement.

### **F.3.13 Acceptance of tender offer**

F.3.13.1 Accept tender offer only if the tenderer complies with the legal requirements stated in the Tender Data.

F.3.13.2 Notify the successful tenderer of the employer's acceptance of his/her tender offer by completing and returning one copy of the form of offer and acceptance before the expiry of the validity period stated in the tender data, or agreed additional period. Providing the form of offer and acceptance does not contain any qualifying statements, it will constitute the formation of a contract between the employer and the successful tenderer as described in the form of offer and acceptance.

### **F.3.14 Notice to unsuccessful tenderers**

After the successful tenderer has acknowledged the employer's notice of acceptance, the employer will publicise a list of successful bidders on the municipal website

### **F.3.14 Municipality's right to accept or reject any or all Bids**

*The municipality reserves the right to:*

- Accept or reject any bid;
- Annul the tender process and reject all bids at any time prior to contract award;
- Award the contract to one or more bidders; without thereby incurring any liability to the affected Bidder or bidders.
- Accept one or more bids submissions.
- Reject all bids submitted.
- Request further information from any bidder after the closing date.
- Cancel this bid or any part thereof any time, or
- Award this bid or any part thereof to any one or more bidders.

**Initial here:** \_\_\_\_\_





- Vary the site or number of sites and/or guards due to operational or budgetary requirements.

**F.3.15. Prepare contract documents**

Revise documents that shall form part of the contract and that were issued by the employer as part of the tender documents to take account of:

- **addenda issued during the tender period,**
- **inclusion of the returnable documents,**
- **other revisions agreed between the employer and the successful tenderer, and**
- **the schedule of deviations attached to the form of offer and acceptance, if any.**

**F.3.16 Issue final contract**

Prepare and issue the final draft of contract documents to the successful tenderer for acceptance within fourteen (14) days after the date of the employer's signing of the form of offer and acceptance (including the schedule of deviations, if any). Only those documents that the conditions of tender require the tenderer to submit, after acceptance by the employer, shall be included.

**F.3.17 Provide copies of the contracts**

Provide to the successful tenderer the number of copies stated in the Tender Data of the signed copy of the contract as soon as possible after completion and signing of the form of offer and acceptance.

**3. EVALUATION METHODOLOGY**

**3.1 Stages of Evaluation**

- Guidelines for Evaluation using the points method
  - a. Score sheets will be prepared and provided to evaluation committee members to evaluate the bids.
  - b. The score sheet should contain all the criteria and the weight for each criterion as well as the values to be applied for evaluation as indicated in the bid documents.
  - c. Each evaluation Committee member should after thorough evaluation independently award his / her own value to each individual criterion.
  - d. Score sheets should be signed by evaluation committee members and if necessary, written motivation may be requested from evaluation committee members where vast discrepancies in the values awarded for each criterion exist.

**Initial here: \_\_\_\_\_**





- e. If the minimum qualifying score for functionality is indicated as a percentage in the bid documents, the percentage scored for functionality may be calculated as follows:
  - i. The value awarded for each criterion should be multiplied by the weight for the relevant criterion to obtain the score for the various criteria;
  - ii. The scores for each criterion should be added to obtain the total score; and
    - The points of each evaluation committee member should be added and divided by the number of evaluation committee members to establish the average percentage obtained by each bidder for functionality.

Stage 1 = Returnables (compliance)

Stage 2: Functionality

Stage 3: Evaluation on Price and Targeted goals 80/20

|             |  |               |
|-------------|--|---------------|
|             | <b>The minimum qualifying score for functionality is 70 points to be further evaluated</b>   |               |
| <b>ITEM</b> | <b>CRITERIA</b>  | <b>WEIGHT</b> |
| <b>A</b>    | Successfully undertaken Transaction Advisory work for which funding was successfully secured.(Reference letters with contactable references to be provided for each similar project undertaken. Failure to submit will result in no points being allocated)<br>Required experience in all three sectors of Public Private Partnership Practice | <b>50</b>     |
|             | 4-5 Appointment Letters and Completed mandate thereof  | 50            |
|             | 2 to 3 appointment letters and completed mandate thereof.<br>30 points; and  | 30            |
|             | 0 to 1 appointment letters and completed mandate thereof.  | 10            |
| <b>B</b>    | <b>Methodology and Project Plan</b>  | <b>25</b>     |

Initial here: \_\_\_\_\_



|                     |  |            |
|---------------------|--|------------|
|                     | Demonstrate the project approach, business model and methods of securing partnerships and funding. | 25         |
| <b>C</b>            | <b>EXPERIENCE</b>  | <b>25</b>  |
|                     | 5 Years experience   | 25         |
|                     | 2-3 Years experience   | 15         |
|                     | 1 Year Experience  | 5          |
|                     | 0 year Experience =0   | 0          |
| <b>TOTAL POINTS</b> |  | <b>100</b> |

Bidders should take note of the above Pre-evaluation criteria.

- All the necessary documentation must be submitted for the Evaluation Panel to make an informed evaluation. Evaluation of the Technical (Quality) Requirements will be based on the information provided by the bidder.
- Experience - The experience annexure must be completed. Only list projects of a similar nature where funding was successfully secured.
- Methodology – The bidder must clearly demonstrate the project approach, business model and methods of securing partnerships and funding.
- Bids that do not meet a minimum of 75 points out of 100 in total for the criteria listed above will not be considered further.

### 3.2 Financial offer and evaluation on price points

- Score Bid evaluation points for financial offer.
- Confirm that Bidders are eligible for the Specific Goals claimed, and if so, score Bid evaluation points for specific Goals.
- Calculate total Bid evaluation points (Price points plus specified goals points)

Initial here: \_\_\_\_\_



- Rank Bid offers from the highest number of Bid evaluation points to the lowest.
- The bidder obtaining the highest number of total points will be awarded the contract.
- Preference points shall be calculated after prices have been brought to a comparative basis taking into account all factors of non-firm prices and all unconditional discounts;.
- Points scored must be rounded off to the nearest 2 decimal places.
- In the event that two or more bids have scored equal total points, the successful bids must be the one scoring the highest number of preference points for Specific goals Points
- However, when functionality is part of the evaluation process and two or more bids have scored equal points including equal preference points for specific Goals, the successful bid must be the one scoring the highest score for functionality.
- Should two or more bids be equal in all respects, the award shall be decided by the drawing of lots.

### 3.3 Price formula

$$N_p = \frac{80[1 - (P_t - P_{min})]}{P_{min}}$$

- Where:  $N_p$  = the number of bid/tender adjudication points awarded for price.
- $P_t$  = the bid/tender sum (corrected if applicable) of the responsive bid under consideration.
- $P_{min}$  = the bid/tender sum (corrected if applicable) of the lowest responsive tender/bid.

### 3.4 Scoring for Specific Goals

Initial here: \_\_\_\_\_



**PART T2 LIST OF RETURNABLE DOCUMENTS**

*The bidder must complete the following returnable documents.*

- T2.1 RETURNABLE SCHEDULES REQUIRED FOR BID EVALUATION PURPOSES .....
- T2.2 OTHER DOCUMENTS REQUIRED FOR BID EVALUATION PURPOSES .....
- T2.3 RETURNABLE SCHEDULES THAT WILL BE INCORPORATED IN THE CONTRACT.....
- T2.4 OTHER DOCUMENTS THAT WILL BE INCLUDED IN THE CONTRACT .....

**NOTE:**

Although the documents under Part T2 is headed “Returnable Documents” in line with the CIDB model, these are not the only documents to be returned together with the bid. **All** the documents indicated on Part T1 must be completed and signed where applicable and submitted as a **complete set of documents**.

**SPECIAL CONDITIONS**

Prior to the appointment as the lead transactional advisor, a detailed Organogram of the project team, detailing each team members experience, qualifications, skills and Professional Registration must be submitted.

Payments will be made according to milestones for each project for which funds has been secured and received will be negotiated on a project by project basis.

The Transaction Advisor’s funding and payment schedule will be agreed with the Providers of projects/programmes at the applicable time. It is the Transaction Advisor’s main mandate to raise the Project Development Funding for the Projects on behalf of the Municipality.

**Initial here:** \_\_\_\_\_



**T2.1 RETURNABLE SCHEDULES REQUIRED FOR BID EVALUATION PURPOSES**

**CONTENTS**

FORM 2.1.1: SCHEDULE OF PREVIOUS WORK CARRIED OUT BY BIDDER

FORM 2.1.2: AUTHORITY FOR SIGNATORY

FORM 2.1.3: SCHEDULE OF PROPOSED SUB-CONTRACTORS

FORM 2.1.4: FINANCIAL REFERENCES

FORM 2.1.5 DETAILS OF ALTERNATIVE BIDS SUBMITTED

FORM 2.1.6 AMENDMENTS & QUALIFICATIONS BY BIDDER

**Physical facilities: Provide information on Company offices/Premises**

| <b>Description</b> | <b>Address</b> | <b>Area (m<sup>2</sup>)</b> |
|--------------------|----------------|-----------------------------|
|                    |                |                             |
|                    |                |                             |
|                    |                |                             |
|                    |                |                             |
|                    |                |                             |

Initial here: \_\_\_\_\_



**FORM 2.1.1 SCHEDULE OF PREVIOUS WORK CARRIED OUT BY BIDDER**

Provide the following information on **relevant previous experience** . Indicate comparable projects of similar or larger size. This information is material to the award of the Contract.

**Give names and telephone numbers and e-mail address per reference. Please provide latest contact details.**

| CLIENT NAME AND PLACE WHERE PROJECT WAS IMPLEMENTED | TEL NO, FAX NO, EMAIL   | DESCRIPTION OF WORK | CONTRACT VALUE (R) | CONTRACT PERIOD |
|---|-------------------------|---------------------|--------------------|-----------------|
|   | _____<br>_____<br>_____ |                     |                    |                 |
|   | _____<br>_____<br>_____ |                     |                    |                 |
|   | _____<br>_____<br>_____ |                     |                    |                 |
|   | _____<br>_____<br>_____ |                     |                    |                 |
|   | _____<br>_____<br>_____ |                     |                    |                 |

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# TSWELOPELE

LOCAL MUNICIPALITY  
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**NB\* Failure to provide information on this section may cause the verification of attached functionality documents to not score the bidder points. ( Municipality will use the e-mail and telephone numbers to verify and give up to 3 working days, if not response received, no points will be awarded).**

**FORM 2.1.2                    AUTHORITY FOR SIGNATORY**

All signatories, **including sole proprietors**, shall confirm their authority by **attaching to this bid** a duly signed and **dated original or certified copy** of the relevant resolution of their members or their board of directors, as the case may be.

**Initial here: \_\_\_\_\_**





**FORM 2.1.3 SCHEDULE OF PROPOSED SUB-CONTRACTORS (PLEASE WRITE N/A IF NO SUBCONTRACTOR WILL BE USED)**

Provide details on all sub-contractors you intend utilising for this contract

| Type of work to be used for       | a<br>% of contract | Name of subcontractor                | b<br>% HDI ownership | c = a x b<br>Total contribution to HDI ownership |
|-----------------------------------|--------------------|--------------------------------------|----------------------|--|
|                                   |                    |                                      |                      |  |
|                                   |                    |                                      |                      |  |
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|                                   |                    |                                      |                      |  |
|                                   |                    |                                      |                      |  |
|                                   |                    |                                      |                      |  |
| Total % of contract subcontracted |                    | Total contribution of HDI ownership: |                      |  |

**FORM 2.1.4 FINANCIAL REFERENCES**

**FINANCIAL STATEMENTS (delete which is not applicable)**

I/We \_\_\_\_\_ (name of authorized representative

Confirm that we have attached a three (3) year audited copy of financial statements together with my/our Directors' and Auditors' report.

Initial here: \_\_\_\_\_



**FORM 2.1.5 DETAILS OF ALTERNATIVE BIDS SUBMITTED**

See condition of bid.

**DESCRIPTION**

Initial here: \_\_\_\_\_



**FORM 2.1.6 AMENDMENTS AND QUALIFICATIONS BY BIDDER**

See condition of bid

Attach additional information on a separate sheets and initial all of them

| PAGE | DESCRIPTION |
|------|-------------|
|      |             |

**T2.2 OTHER DOCUMENTS REQUIRED FOR BID EVALUATION PURPOSES**

**CONTENTS**

FORM 2.2.1 DECLARATION

FORM 2.2.2 DECLARATION OF INTEREST

FORM 2.2.3 CERTIFICATION

FORM 2.2.4 MBD 9

**FORM 2.2.1 DECLARATION:**

I/ We, the undersigned:

Initial here: \_\_\_\_\_



- (a) To all Municipal Staff described both in this and the other Schedules to this Contract to which I shall annex my signature;
- (b) Agree that we will be bound by the specifications, prices, terms and conditions stipulated in those Schedules attached to this bid document, regarding execution of duties;
- (c) Further agree to be bound by those conditions, set out in, "PARTS T1; T2; C1; C2; and C3", attached hereto, should this bid be accepted;
- (d) Confirm that this bid may only be accepted by Tswelopele Local Municipality by way of a duly authorised Letter of Acceptance within fourteen (14) days from the date of appointment;
- (e) Declare that we are fully acquainted with the Bid document and Schedules and the contents thereof and that we have signed the Bill of Quantities and completed the Returnable Schedules and declarations, attached hereto;
- (f) Declare that all amendments to the bid document have been initialled by the relevant authorised person and that the document constitutes a proper contract between TLM and the undersigned;
- (g) Certify that the item/s mentioned in the bid document, qualifies/qualify for the preference(s) shown.
- (h) Acknowledge that the information furnished is true and correct;
- (i) Accept that in the event of the contract being awarded as a result of preference claimed in this bid document, I may be required to furnish documentary proof to the satisfaction of TLM that the claims are correct. If the claims are found to be inflated, TLM may in addition to any other remedy it may have, recover from the company or me all costs, losses or damages incurred or sustained by TLM as a result of the award of the contract and/or cancel the contract and claim any damages which TLM may suffer by having to make less favourable arrangements after such cancellation;
- (j) Declare that no municipal rates and taxes or municipal service charges owed by the bidder or any of its directors to the municipality, or to any other municipality or municipal entity, are in arrears for more than three (3) months; and
- (k) Declare that I have not failed to perform satisfactorily during the last five (5) years on a previous contract with the Municipality, Municipal entity or any other organ of state, after written notice was given to me that my performance was not satisfactory.

Signed at \_\_\_\_\_ on this \_\_\_\_\_ day of \_\_\_\_\_ 20 \_\_\_\_\_

Authorised Signature: \_\_\_\_\_

Name of Bidding Entity: \_\_\_\_\_

Date: \_\_\_\_\_

Sign as witness: \_\_\_\_\_

**FORM 2.2.2 DECLARATION OF INTEREST**

Initial here: \_\_\_\_\_



# TSWELOPELE

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1. No bid will be accepted from persons in the service of the state including in instances of non-directors of the entity and also those who may be sub-contracting.
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 and/or take an oath declaring his/her interest.
- 3 In order to give effect to the above, the following questionnaire must be completed with honesty and submitted with the bid.

Full Name: \_\_\_\_\_

Identity Number: \_\_\_\_\_

Tax Number: \_\_\_\_\_

VAT Number: \_\_\_\_\_

3.1 Are you presently in the service of the state  **YES / NO** \_\_\_\_\_

If yes, furnish particulars \_\_\_\_\_

\_\_\_\_\_

3.2 Have you been in the service of the state for the past twelve (12) months? **YES / NO**

If yes, furnish particulars \_\_\_\_\_

\_\_\_\_\_

3.3 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** \_\_\_\_\_

If yes, furnish particulars \_\_\_\_\_

SCM Regulations: "in the service of the state" means to be –

(a) a member of –

(i) any municipal Council;

(ii) any provincial legislature; or

Initial here: \_\_\_\_\_



(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.

\_\_\_\_\_

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

If yes, furnish particulars \_\_\_\_\_  
\_\_\_\_\_

**3.5 Are any spouse, child or parent of the company’s directors, managers, principle shareholders or stakeholders in service of the state? YES / NO**

If yes, furnish particulars \_\_\_\_\_  
\_\_\_\_\_

**FORM 2.2.3 CERTIFICATION**

I, THE UNDERSIGNED (NAME) \_\_\_\_\_ CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM IS TRUE AND CORRECT. THAT ANY MISREPRESENTATION OF

INFORMATION MAY LEAD TO IMMEDIATE CANCELLATION OF THE AGREEMENT.

**I ACCEPT THAT THE STATE MAY ACT AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.**

SHOULD THE INFORMATION REQUIRED ON THIS FORM NOT DULY BE SUPPLIED, THIS BID WILL BE AUTOMATICALLY REJECTED.

Initial here: \_\_\_\_\_



\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Position

\_\_\_\_\_  
Company Name

**MBD 6.1**

**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**

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

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

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

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

**Initial here:** \_\_\_\_\_

39



The maximum points for this tender are allocated as follows:

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

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

## 2. DEFINITIONS

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

## 3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

### 3.1. POINTS AWARDED FOR PRICE

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

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

Initial here: \_\_\_\_\_

40





**80/20**

or

**90/10**

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

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

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

#### 3.2.1. POINTS AWARDED FOR PRICE

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

**80/20**

or

**90/10**

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

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmax = Price of highest acceptable tender

### 4. POINTS AWARDED FOR SPECIFIC GOALS

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

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

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

Initial here: \_\_\_\_\_



applicable preference point system; or

- (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,

then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

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

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

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

| The specific goals allocated points in terms of this tender | Number of points allocated (90/10 system)<br>(To be completed by the organ of state) | Number of points allocated (80/20 system)<br>(To be completed by the organ of state) | Number of points claimed (90/10 system)<br>(To be completed by the tenderer) | Number of points claimed (80/20 system)<br>(To be completed by the tenderer) |
|---|--|--|--|--|
|   |  |  |  |  |
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**DECLARATION WITH REGARD TO COMPANY/FIRM**

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

4.4. Company registration number: .....

4.5. TYPE OF COMPANY/ FIRM

Initial here: \_\_\_\_\_



# TSWELOPELE

LOCAL MUNICIPALITY  
A MUNICIPALITY IN PROGRESS

- 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 forward the matter for criminal prosecution, if deemed necessary.

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

**SURNAME AND NAME:** .....



# TSWELOPELE

LOCAL MUNICIPALITY  
A MUNICIPALITY IN PROGRESS

**DATE:** .....

**ADDRESS:** .....

.....

.....

**Bids will be evaluated in accordance with the prescripts of the Preferential Procurement Policy Framework Act (PPPFA) and the associated Preferential Procurement Regulations of 2022, which stipulate a 80/20 preference point system for acquisition of goods or services for Rand value equal to or above R0.00 and up to R50 million.**

**Initial here:** \_\_\_\_\_

**Points for the specific goals for contracting with persons, or categories of persons, historically disadvantaged by unfair discrimination on the basis of race:**

| Black-owned and B-BBEE Status Level of Contributor                | Number of points on 80/20 points system | Number of points on 90/10 points system | Required Proof   |
|---|---|---|--|
| 100% Black-owned enterprise with a valid B-BBEE level 1           | 6                                       | 3                                       | Sworn affidavit/BBBEE verification certificate (SANA) approved or from a registered accountant |
| 51% Black-owned enterprise with a valid B-BBEE level 2            | 4                                       | 2                                       | BBBEE Certificate from a SANAS approved agency   |
| 51% Black-owned enterprise with a valid B-BBEE level 3            | 2                                       | 1                                       | BBBEE Certificate from a SANAS approved agency   |
| Less than 51% Black-owned enterprise irrespective of B-BBEE level | 0                                       | 0                                       | BBBEE Certificate from a SANAS approved agency   |

**Points for the specific goals for contracting with persons, or categories of persons, historically disadvantaged by unfair discrimination on the basis of gender**

Initial here: \_\_\_\_\_

| Women-owned and B-BBEE Status Level of Contributor                | Number of points on 80/20 points system | Number of points on 90/10 points system | Required Proof   |
|---|---|---|--|
| 100% Women-owned enterprise with no B-BBEE certificate            | 4                                       | 2                                       | Sworn affidavit/BBBEE verification certificate (SANA) approved or from a registered accountant |
| 51% Women-owned enterprise with a valid B-BBEE level 1            | 3                                       | 1                                       | BBBEE Certificate from a SANAS approved agency   |
| 51% Women-owned enterprise with a valid B-BBEE level 2            | 2                                       | 1                                       | BBBEE Certificate from a SANAS approved agency   |
| 51% Women-owned enterprise with a valid B-BBEE level 3            | 1                                       | 1                                       | BBBEE Certificate from a SANAS approved agency   |
| Less than 51% Women-owned enterprise irrespective of B-BBEE level | 0                                       | 0                                       | BBBEE Certificate from a SANAS approved agency   |

**Points for the specific goals for contracting with persons, or categories of persons, historically disadvantaged by unfair discrimination on the basis of disability:**

Initial here: \_\_\_\_\_



| Black-owned and B-BBEE Status Level of Contributor                                      | Number of points on 80/20 points system | Number of points on 90/10 points system | Required Proof                                 |
|---|---|---|--|
| 100% Disabled-owned enterprise with no B-BBEE certificate but with proof of disability. | 4                                       | 2                                       | Sworn affidavit and medical certificate        |
| 51% Disabled-owned enterprise with a valid B-BBEE level 1                               | 3                                       | 1                                       | BBBEE Certificate from a SANAS approved agency |
| 51% Disabled-owned enterprise with a valid B-BBEE level 2                               | 2                                       | 1                                       | BBBEE Certificate from a SANAS approved agency |
| 51% Disabled-owned enterprise with a valid B-BBEE level 3                               | 1                                       | 1                                       | BBBEE Certificate from a SANAS approved agency |
| Less than 51% Disabled-owned enterprise irrespective of B-BBEE level                    | 0                                       | 0                                       | BBBEE Certificate from a SANAS approved agency |

**Points for the specific goals for contracting with persons, or categories of persons, historically disadvantaged by unfair discrimination on the basis of Youth:**

Initial here: \_\_\_\_\_



| Black-owned and B-BBEE Status Level of Contributor                | Number of points on 80/20 points system | Number of points on 90/10 points system | Required Proof                                 |
|---|---|---|--|
| 100% Youth-owned enterprise with no B-BBEE.                       | 4                                       | 2                                       | Sworn affidavit and medical certificate        |
| 51% Youth-owned enterprise with a valid B-BBEE level 1            | 3                                       | 1                                       | BBBEE Certificate from a SANAS approved agency |
| 51% Youth-owned enterprise with a valid B-BBEE level 2            | 2                                       | 1                                       | BBBEE Certificate from a SANAS approved agency |
| 51% Youth-owned enterprise with a valid B-BBEE level 3            | 1                                       | 1                                       | BBBEE Certificate from a SANAS approved agency |
| Less than 51% Youth-owned enterprise irrespective of B-BBEE level | 0                                       | 0                                       | BBBEE Certificate from a SANAS approved agency |

Initial here: \_\_\_\_\_





MBD 8

**DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES**

- 1 This Standard Bidding Document must form part of all bids invited.
- 2 It serves as a declaration to be used by institutions in ensuring that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system.
- 3 The bid of any bidder may be disregarded if that bidder, or any of its directors have-
  - a. abused the institution's supply chain management system;
  - b. committed fraud or any other improper conduct in relation to such system; or
  - c. failed to perform on any previous contract.
- 4 **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**

| Item  | Question  | Yes                             | No                             |
|-------|---|---------------------------------|--------------------------------|
| 4.1   | 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?<br><b>(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>audi alteram partem</i> rule was applied).</b><br><br>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. | Yes<br><input type="checkbox"/> | No<br><input type="checkbox"/> |
| 4.1.1 | If so, furnish particulars:   |                                 |                                |
| 4.2   | Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)?<br><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>   | Yes<br><input type="checkbox"/> | No<br><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 outside of the Republic of South Africa) for fraud or corruption during the past five years?  | Yes<br><input type="checkbox"/> | No<br><input type="checkbox"/> |
| 4.3.1 | If so, furnish particulars:   |                                 |                                |
| 4.4   | Was any contract between the bidder and any organ of state terminated during the past five years on account of failure to perform on or comply with the contract?   | Yes<br><input type="checkbox"/> | No<br><input type="checkbox"/> |

Initial here: \_\_\_\_\_



|       |                             |
|-------|-----------------------------|
| 4.4.1 | If so, furnish particulars: |
|-------|-----------------------------|

**MBD 8**

**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**

**MBD 9**

**FORM 2.2.4 CERTIFICATE OF INDEPENDENT BID DETERMINATION**

- a) This Municipal Bidding Document (MBD) must form part of all bids<sup>1</sup> invited.
- b) 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.
- c) Treasury Regulation 16A9 prescribes that accounting officers and accounting authorities must take all reasonable steps to prevent abuse of the supply chain management system and authorizes accounting officers and accounting authorities to:
  - i. Disregard the bid of any bidder if that bidder, or any of its directors have abused the institution's supply chain management system and or committed fraud or any other improper conduct in relation to such system.

**Initial here:** \_\_\_\_\_



- ii. Cancel a contract awarded to a supplier of goods and services if the supplier committed any corrupt or fraudulent act during the bidding process or the execution of that contract.
- d) 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.
- e) 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: TSWELOPELE LOCAL MUNICIPALITY

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

I certify, on behalf of

\_\_\_\_\_

(Name of Bidder)

that:

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

Initial here: \_\_\_\_\_



“competitor” shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:

- has been requested to submit a bid in response to this bid invitation;
  - could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
  - 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 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 2004 or any other applicable legislation.

\_\_\_\_\_  
**Signature**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Position**

\_\_\_\_\_  
**Company Name**

Initial here: \_\_\_\_\_



**APPOINTMENT OF PANEL OF SERVICE PROVIDERS FOR PROVISION WORKS/GOODS AND SERVICES FOR PERIOD ENDING 30 JUNE 2027**

**T2.3 RETURNABLE SCHEDULES THAT WILL BE INCORPORATED IN THE CONTRACT**

**FORM 2.3.1 RECORD OF ADDENDA TO BID DOCUMENTS**

We confirm that the following communications received from the Procuring Department before the submission of this bid offer, amending the bid documents, have been taken into account in this bid offer:

|   | Date | Title or Details |
|---|------|------------------|
| 1 |      |                  |
| 2 |      |                  |
| 3 |      |                  |
| 4 |      |                  |
| 5 |      |                  |

Attach additional pages if more space is required.

Signature of Authorized person: \_\_\_\_\_ Date: \_\_\_\_\_

Name of authorized person: \_\_\_\_\_ Position: \_\_\_\_\_

**APPOINTMENT OF A PANEL OF ATTORNEYS TO PROVIDE LEGAL SERVICES FOR TSWELOPELE LOCAL MUNICIPALITY "AS WHEN AND REQUIRED BASIS" FOR PERIOD ENDING 30 JUNE 2027**

**PART C1 PRICING DATA**

C1.1 PRICING INSTRUCTIONS

C1.2 BILL OF QUANTITIES

Initial here: \_\_\_\_\_



### **C1.1 PRICING INSTRUCTIONS**

- 1 The General Conditions of Contract, the Contract Data, the Specifications (including the Project Specifications) and the Drawings shall be read in conjunction with the Bill of Quantities.
- 2 The Bill comprises items covering the Contractor's profit and costs of general liabilities and of the construction of Temporary and Permanent Works.

Although the Bidder is at liberty to insert a rate of his own choosing for each item in the Bill, he should note the fact that the Contractor is entitled, under various circumstances, to payment for additional work carried out.

Clause 8 of each Standardized Specification, and the measurement and payment clause of each Particular Specification, read together with the relevant clauses of the Project Specifications, all set out which ancillary or associated activities are included in the rates for the specified operations.

- 3 Descriptions in the Bill of Quantities are abbreviated and may differ from those in the Standardized and Project Specifications. No consideration will be given to any claim by the Company submitted on such a basis. Should any requirement of the measurement and payment clause of the appropriate Standardized or Project Specification(s) be contrary to the terms of the Bill the requirement of the appropriate Standardized, Project, or Particular Specification as the case may be, shall prevail.
- 4 Unless stated to the contrary, items are measured net in accordance with the sites without any allowance having been made for waste.
- 5 The amounts and rates to be inserted in the Bill of Quantities shall be the full inclusive amounts to the Employer for the work described under the several items. Such amounts shall cover all the costs and expenses that may be required in and for the provision of Security services in identified sites, and shall cover the costs of all general risks, profits, taxes (but excluding value-added tax), liabilities and obligations set forth or implied in the documents on which the Bid is based.
- 6 The quantities set out in the schedule of quantities are only approximate quantities. The quantities of work finally accepted and certified for payment, and not the quantities given in the schedule of quantities, will be used to determine payments to the contractor.
- 7 An amount or rate shall be entered against each item in the Bill of Quantities, whether or not quantities are stated. An item against which no amount or rate is entered will be considered to be covered by the other amounts or rates in the Bill.

The Bidder shall also fill in a rate against the items where the words "rate only" appear in the amount column. Although no work is foreseen under these items and no quantities are consequently given in the quantity column, the stated rates shall apply should work under these items actually be required.

Should the Bidder group a number of items together and bid one sum for such group of items, the single stated sum shall apply to that group of items and not to each individual item, or should he indicate against any item that full compensation for such item has been included in another item, the rate for the item included in another item shall be deemed to be nil.

The stated rates, prices and sums shall, subject only to the provisions of the Conditions of Contract, remain valid irrespective of any change in the quantities during the execution of the Contract.

Initial here: \_\_\_\_\_





Rates quoted are fixed and quoted in ZAR currency; and shall not in any way be affected by rand/dollar exchange rate or any currency.

8 The quantities of work as measured and accepted and certified for payment in accordance with the Conditions of Contract, and not the quantities stated in the Bill of Quantities, will be used to determine payments to the Contractor. The validity of the Contract shall in no way be affected by differences between the quantities in the Bill of Quantities and the quantities certified for payment.

9 For the purposes of this Bill of Quantities, the following words shall have the meanings hereby assigned to them:

Unit : The unit of measurement for each item of work as defined in the Standardized, Project or Particular Specifications

Quantity : The number of units of work for each item

Rate : The payment per unit of work at which the Bidder bids to do the work. Should be quoted in ZAR currency only

Amount : The quantity of an item multiplied by the bidder's rate of the (same) item. Should be quoted in ZAR currency only

Sum : An amount bid for an item, the extent of which is described in the Bill of Quantities, the Specifications or elsewhere, but of which the quantity of work is not measured in units. Should be quoted in ZAR currency only

10 The units of measurement indicated in the Bill of Quantities are metric units. The following abbreviations may appear in the Bill of Quantities:

No = No  
% = Percentage  
Prov Sum = Provisional Sum

- The Transaction Advisors will not be paid directly from the Tswelopele Local Municipality budget or grants.
- One of the key roles of the Transaction Advisor is to raise funds for identified programs and projects. They will be paid a negotiated percentage fee of the funds successfully raised and secured. The discussions are also to get an agreement on the intervals of the milestones of to pay the fees.

## **C1.2 Bill of Quantities**

### **C.2.1 DESCRIPTION OF WORK**

#### **C2.1.1 Scope of Work**

The proposal is to acquire the services of a Transaction Advisers for various Projects and programmes. The Transactional advisors will be working with user departments in the management and implementation of Tswelopele Local Municipality's Projects and programmes as outlined in the Municipal long- term Vision. The key responsibility of the Transaction Advisers is to develop sector specific business plans and source funding on a Project Finance Basis Plus Implementation of capital Projects if applicable.

Initial here: \_\_\_\_\_



“Provide a short summary of the municipality’s strategic vision on projects and programmes” All proposals received which meet the functionality criteria will be adjudicated accordingly.

The next phase will be for the appointed firm/service provider to seek funding and to present the full proposal including the funding, terms, conditions and fees, which will best promote the Tswelopele Local Municipality’s brand, cost effectiveness and importantly assist in achieving the goals set in the National Development Plan.

The Project Team will assess the proposals to establish if they meet the expectations of the Municipality and enter into further contractual agreements with the Transactional Advisor and the funding Institution(s).

The Transactional Advisors will be required to work towards the realisation of the following Programmes and projects.

in line with the municipality’s vision:

- Sewer Upgrades
- Stormwater Upgrades
- Wastewater Treatment Works
- Energy (Independent Power Production)
- Electrification and Distribution
- Road Upgrades
- Training Programmes
- Local Economic Development initiatives and programmes
- Township Establishment

The Transaction Advisors deliverables are as follows:

### **Phase 1: Feasibility Study**

- 1.1 The Transaction Advisor is required to undertake a comprehensive feasibility analysis to establish the viability and affordability of the proposal.
- 1.2 The analysis will include an assessment of the viability of developing the project through a PPP arrangement and will include, among others, the following components:
  - Specific analysis into the feasibility of executing this project in consideration of both the lifecycle costs and revenue streams.
  - Financing options for the Project;
- 1.3 A PPP Options Report which will include the full identification and allocation of transaction risks to both the public and private parties. The allocation will be based on who is best placed to manage the risks. In other words, the allocation will be a reflection of the comparative or relative ability of each party to address a specific risk. The allocation will also set out how the risk allocation impacts on the transaction;
- 1.4 Establishing that the PPP proposal delivers value-for-money for the Municipality; affordable rates for the users, and at the same time provides an acceptable return on investment to the investor.
- 1.5 Local market sounding and investment promotion meetings for the purposes of gauging investment appetite for the transaction and its proposed structure;
- 1.6 The Transaction Advisor and User department within the municipality are to prepare documentation for consideration by the Tswelopele Local Municipality’s Supply Chain Management Unit. The documentation shall concisely set out:
  - Brief description of the project.
  - The output specifications
  - Requirements for compliant bids as prescribed by the Tswelopele Local Municipality SCM Policy;

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- A risk profile as established in the feasibility study;
- The payment mechanism;
- The bid process;
- Evaluation criteria;
- Bidder communication systems;
- Draft Agreement.
- Any other matter that may have a material impact on any element of the Project

## **Phase 2: PPP Procurement**

- 2.1 In the event that a feasibility study, a PPP solution is considered an optimal solution, and if the Tswelopele Local Municipality opts to proceed to the procurement stage the Transaction Advisors will be required to provide the necessary technical, legal and financial advisory support for the procurement of the public private partner.
- 2.2 All activities shall comply with the provisions of the PPP Guidelines and Procedures Manual and other applicable procurement and PPP principles and Regulations.
- 2.3 PPP Agreement Negotiations
- 2.4 The Advisors will assist the Tswelopele Local Municipality in the final negotiations with the preferred service provider. This will involve categorizing issues appropriately, developing timelines for completion, and planning negotiation strategies and processes for reaching an effective agreement. The Advisor must ensure that all agreements reached are incorporated into appropriate financial, commercial and legal documentation, and must assist with drafting the necessary and related correspondence.
- 2.5 The Transaction Advisors will be required to submit a close-out report for securing the public private partner.
- 2.6 The final terms of the agreements, each as negotiated with the preferred service provider, must be submitted to the Tswelopele Local Municipality, along with the PPP agreement management plan. The Transaction Advisors will be responsible for compilation of the necessary documentation to obtain the necessary approval.

## **ACTIVITIES AND DELIVERABLES**

### **Activities**

- The Transaction Advisor will be required to produce a comprehensive feasibility study for the Project working with relevant government departments or parastatal or private partner.
- Transaction Advisor support will be inclusive of planning, feasibility analysis, source funding, procurement support and/or Implementation.
- In order for the Tswelopele Local Municipality to make an informed decision, the Transaction Advisor must provide the full project cycle costs, affordability limits and risks.
- On completion of the aforementioned phase the funder will have identified a project that is suitable for development or implementation.
- The key objective is to improve the quality of project outcomes by ensuring a link between the objectives of the municipality.

### **Deliverables:**

- Establish public private partnerships at all levels.
- Secure funding for projects;



- Implementation of projects/programme if applicable
- Inception / Project Initiation Phase:
- Confirmation of the Scope of work
- Confirm Project deliverables
- Confirm Project approach and methodology
- Identification of pertinent stakeholders
- Identify Project Risks
- Present a project program including a schedule of meetings
- Develop a payment program

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**TSWELOPELE**  
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**PART C3 AGREEMENT AND CONTRACT DATA**

C3.1 FORM OF OFFER AND ACCEPTANCE

C3.2 AGREEMENT IN TERMS OF THE OCCUPATIONAL HEALTH AND SAFETY ACT, 1993 (ACT NO 85 OF 1993)

C3.3 CERTIFICATE OF AUTHORITY FOR SIGNATORY TO AGREEMENT IN TERMS OF OCCUPATIONAL HEALTH AND SAFETY ACT, 1993 (ACT NO 85 OF 1993)

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**C3.1 FORM OF OFFER AND ACCEPTANCE [THIS SECTION MUST BE COMPLETED AFTER APPOINTMENT]**

**FORM OF OFFER AND ACCEPTANCE (AGREEMENT)**

**1. OFFER**

The Employer, identified in the Acceptance signature block, has solicited offers to enter into a contract in respect of the following works - APPOINTMENT OF TRANSACTIONAL ADVISORY FOR TSWELOPELE LOCAL MUNICIPALITY FOR PERIOD ENDING 30 JUNE 2027

The Bidder, identified in the Offer signature block below, has examined the documents listed in the Bid Data and addenda thereto as listed in the Bid Schedules, and by submitting this Offer has accepted the Conditions of Bid.

By the representative of the Bidder, deemed to be duly authorised, signing this part of this Form of Offer and Acceptance, the Bidder 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 OFFERED TOTAL OF THE PRICES INCLUSIVE OF VALUE ADDED TAX.**

The prices and rates to be inserted in the Bill of Quantities are to be full inclusive prices for the work described under several items. Such prices and rates shall cover all costs and expenses that may be required in and for the execution of the work described, and shall cover the costs of all general risks, liabilities and obligations set forth or implied in the documents on which the tender is based, as well as overhead charges and profit. Reasonable prices shall be inserted as these will be used as a basis for assessment of payment for additional work that may have to be carried out.

4.2 A price or rate is to be entered against each item in the Bill of Quantities, whether the quantities are stated or not. An item against which no price is entered or where a word or phrase such as "included" or "provided elsewhere" will be accepted as a rate of nil (R0.00) having been entered against such items and covered by the other prices or rates in the schedule.

Any work executed to which such a pay item applies, shall be measured under the appropriate items in the Bill of Quantities and valued at a rate of nil (R0.00). The rate of nil shall be valid irrespective of any change in the quantities during the execution of the Contract.

4.3 The Tendered shall fill in a rate against all items where the words "Rate Only" appears in the amount column. The intention is that, although no work is foreseen under such item and no quantities are consequently given in the quantity column, the tendered rate shall apply should work under this item be actually required.

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- 4.4 Except where rates only are required, the Tenderer shall insert all amounts to be included in his total tendered price in the “Amount” column and show the corresponding total tendered price.
- 4.5 The Tenderer shall not group together a number of items and tender one rate for such group of items.
- 4.6 All rates and sums of money quoted in the Bill of Quantities shall be in Rands and whole cents. Fractions of a cent shall be discarded.
- 4.7 All prices and rates entered in the Bill of Quantities must be excluding **Value Added Tax (VAT)**. VAT will be added last on the summary page of the Bill of Quantities.
- 4.8 Should exclusively high prices be tendered, such prices may be of sufficient importance to warrant rejection of a tender by the Engineer.
- 4.9 Where the Contractor is required to furnish detailed drawings and designs or other information in terms of the Contract Documents, all costs thereof shall be deemed to have been provided for and included in the unit rates and sum amounts tendered for the items in the Bill Of Quantities, and separate additional payments will not be made

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 Bidder before the end of the period of validity stated in the Bid Data, whereupon the Bidder becomes the party named as the Contractor in the Conditions of Contract identified in the Contract Data.

It is expressly agreed that no other matter whether in writing, oral communication or implied during the period between the issue of the Bid documents and the receipt by the Bidder of a completed signed copy of this Agreement shall have any meaning or effect in the contract between the parties arising from this Agreement.

**FOR THE BIDDER:**

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

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

Capacity \_\_\_\_\_

Company Name \_\_\_\_\_

Name of Witness \_\_\_\_\_

Signature \_\_\_\_\_

Date: \_\_\_\_\_

**4. ACCEPTANCE**

Initial here: \_\_\_\_\_



# TSWELOPELE

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By signing this part of this Form of Offer and Acceptance, the Employer identified below accepts the Bidder's Offer. In consideration thereof, the Employer shall pay the Contractor the amount due in accordance with the Conditions of Contract identified in the Contract Data. Acceptance of the Bidder's Offer shall form an agreement between the Employer and the Bidder upon the terms and conditions contained in this Agreement and in the Contract that is the subject of this Agreement.

The terms of the contract, are contained in

- Part C1 Pricing Data
- Part C2 Scope of Work
- Part C3 Agreements and Contract Data, (which includes this Agreement)

AND Documents or parts thereof, which may be incorporated by reference into Parts C1 to C3 above.

Deviations from and amendments to the documents listed in the Bid Data and any addenda thereto listed in the Bid Schedules as well as any changes to the terms of the Offer agreed by the Bidder and the Employer during this process of offer and acceptance, are contained in the Schedule of Deviations attached to and forming part of this Agreement. No amendments to or deviations from said documents are valid unless contained in this Schedule, which must be duly signed by the authorised representative(s) of both parties.

The Bidder shall within two weeks after receiving a completed copy of this Agreement, including the Schedule of Deviations (if any), contact the Employer's agent (whose details are given in the Contract Data) to arrange the delivery of any bonds, guarantees, proof of insurance and any other documentation to be provided in terms of the Conditions of Contract identified in the Contract Data. Failure to fulfil any of these obligations in accordance with those terms shall constitute a repudiation of this Agreement.

Notwithstanding anything contained herein, this Agreement comes into effect on the date when the Bidder receives one fully completed original copy of this document, including the Schedule of Deviations (if any). Unless the Bidder (now Contractor) within five working days of the date of such receipt notifies the Employer in writing of any reason why he cannot accept the contents of this Agreement, this Agreement shall constitute a binding contract between the parties.

It is expressly agreed that no other matter whether in writing, oral communication or implied during the period between the issue of the Bid documents and the receipt by the Bidder of a completed signed copy of this Agreement shall have any meaning or effect in the contract between the parties arising from this Agreement.

## FOR THE EMPLOYER: TSWELOPELE LOCAL MUNICIPALITY

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

Initial here: \_\_\_\_\_



Name \_\_\_\_\_

Capacity \_\_\_\_\_

Name of Witness \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

## 2. SCHEDULE OF DEVIATIONS

Notes:

1. The extent of deviations from the bid documents issued by the Employer prior to the bid closing date is limited to those permitted in terms of the Conditions of Bid.
2. A Bidder's covering letter shall not be included in the final contract document. Should any matter in such letter, which constitutes a deviation as aforesaid become the subject of agreements reached during the process of offer and acceptance, the outcome of such agreement shall be recorded here.
3. Any other matter arising from the process of offer and acceptance either as a confirmation, clarification or change to the bid documents and which it is agreed by the Parties becomes an obligation of the contract shall also be recorded here.
4. Any change or addition to the bid documents arising from the above agreements and recorded here, shall also be incorporated into the final draft of the Contract.

**1 Subject** \_\_\_\_\_

Details \_\_\_\_\_

**2 Subject** \_\_\_\_\_

Details \_\_\_\_\_

**3 Subject** \_\_\_\_\_

Details \_\_\_\_\_

**4 Subject** \_\_\_\_\_

Details \_\_\_\_\_

**5 Subject** \_\_\_\_\_

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Details \_\_\_\_\_

By the duly authorised representatives signing this Schedule of Deviations, the Employer and the Bidder agree to and accept the foregoing Schedule of Deviations as the only deviations from and amendments to the documents listed in the Bid Data and addenda thereto as listed in the Bid Schedules, as well as any confirmation, clarification or change to the terms of the offer agreed by the Bidder and the Employer during this process of offer and acceptance.

It is expressly agreed that no other matter whether in writing, oral communication or implied during the period between the issue of the bid documents and the receipt by the Bidder of a completed signed copy of this Agreement shall have any meaning or effect in the contract between the parties arising from this Agreement.

**FOR THE BIDDER:**

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

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

Capacity \_\_\_\_\_

(Bidder's Name) \_\_\_\_\_

Name of Witness \_\_\_\_\_

Signature \_\_\_\_\_

Date: \_\_\_\_\_

**FOR THE EMPLOYER: TSWELOPELE LOCAL MUNICIPALITY**

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

Name \_\_\_\_\_

Capacity \_\_\_\_\_

Name of Witness \_\_\_\_\_

**Initial here:** \_\_\_\_\_





Signature \_\_\_\_\_

Date \_\_\_\_\_

**C3.2 AGREEMENT IN TERMS OF THE OCUPATIONAL HEALTH AND SAFETY ACT, 1993 (ACT NO 85 OF 1993)**

THIS AGREEMENT made at \_\_\_\_\_

On this the \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_\_

Between **TSWELOPELELOCAL MUNICIPALITY** (hereinafter called "the **Employer**") herein represented by \_\_\_\_\_

In his/her capacity as \_\_\_\_\_

And

\_\_\_\_\_  
(Hereinafter called "the Mandatory") of the other part, herein represented by

\_\_\_\_\_  
In his/her capacity as \_\_\_\_\_

WHEREAS the Employer is desirous that certain works be undertaken as per this contract:

\_\_\_\_\_  
and has accepted a Bid by the Mandatory for the provision of such services and whereas the Employer and the Mandatory have agreed to certain arrangements and procedures to be followed in order to ensure compliance by the Mandatory with the provisions of the Occupational Health and Safety Act, 1993 (Act 85 of 1993);

NOW THEREFORE THIS AGREEMENT WITNESSETH AS FOLLOWS:

- 1 The Mandatory shall execute the work in accordance with the Contract Documents pertaining to this Contract.

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- 2 This Agreement shall hold good from its Commencement Date, which shall be the date of a written notice from the Employer or Employer's representative requiring him to commence the execution of the Works, to either
- (a) the date of the Final Approval Certificate issued
  - (b) the date of termination of the Contract
- 3 The Mandatory declares himself/herself to be conversant with the following:
- (a) All the requirements, regulations and standards of the Occupational Health and Safety Act (Act 85 of 1993), hereinafter referred to as "The Act", together with its amendments and with special reference to the following Sections of The Act:
    - (i) Section 8 : General duties of employers to their employees;
    - (ii) Section 9 : General duties of employers and self-employed persons to persons other than employees;
    - (iii) Section 37 : Acts or omissions by employees or mandataries, and
    - (iv) Subsection 37(2) relating to the purpose and meaning of this Agreement.
  - (b) The procedures and safety rules of the Employer as pertaining to the Mandatory and to all his subcontractors.
- 3 The Mandatory is responsible for the compliance with the Act by all his subcontractors, whether or not selected and/or approved by the Employer.
- 4 The Mandatory warrants that all his/her and his/her subcontractors' workmen are covered in terms of the Compensation for Occupational Injuries and Diseases Act, 1993 which cover shall remain in force whilst any such workmen are present on site. A letter of good standing from the Compensation Commissioner to this effect must be produced to the Employer upon signature of the agreement.
- 5 The Mandatory undertakes to ensure that he and/or subcontractors and/or their respective employers will at all times comply with the following conditions:
- (a) The Mandatory shall assume the responsibility in terms of Section 16.1 of the Occupational Health and Safety Act. The Mandatory shall not delegate any duty in terms of Section 16.2 of this Act without the prior written approval of the Employer. If the Mandatory obtains such approval and delegates any duty in terms of section 16.2 a copy of such written delegation shall immediately be forwarded to the Employer.
  - (b) All incidents referred to in the Act shall be reported by the Mandatory to the Department of Labour as well as to the Employer. The Employer will further be provided with copies of all written documentation relating to any incident.
  - (c) The Employer hereby obtains an interest in the issue of any formal inquiry conducted in terms of section 32 of the Act into any incident involving the Mandatory and/or his employees and/or his subcontractors.

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6 In witness thereof the parties hereto have set their signatures hereon in the presence of the subscribing witnesses:

**SIGNED FOR AND ON BEHALF OF THE EMPLOYER:**

SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

DESIGNATION \_\_\_\_\_ DATE \_\_\_\_\_

**SIGNED FOR AND ON BEHALF OF THE MANDATORY:**

SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

DESIGNATION \_\_\_\_\_ DATE \_\_\_\_\_

**C3.3 CERTIFICATE OF AUTHORITY FOR SIGNATORY TO AGREEMENT IN TERMS OF OCCUPATIONAL HEALTH AND SAFETY ACT, 1993 (ACT NO 85 OF 1993)**

The signatory for the company that is the Contractor in terms of the above-mentioned Contract and the Mandatory in terms of the above-mentioned Act shall confirm his or her authority thereto by attaching to this page a duly signed and dated copy of the relevant resolution of the Board of Directors.

**An example is given below:**

"By resolution of the Board of Directors passed at a meeting held on

\_\_\_\_\_ 20 \_\_\_\_\_,

Mr/Ms

\_\_\_\_\_ whose signature

Appears below, has been duly authorised to sign the AGREEMENT in terms of THE

OCCUPATIONAL HEALTH AND SAFETY ACT, 1993 (ACT 85 of 1993) on behalf of

\_\_\_\_\_  
**SIGNED ON BEHALF OF THE COMPANY:**

**Initial here:** \_\_\_\_\_



# TSWELOPELE

LOCAL MUNICIPALITY  
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IN HIS/HER CAPACITY AS: \_\_\_\_\_

DATE: \_\_\_\_\_

SIGNATURE OF SIGNATORY: \_\_\_\_\_

WITNESS SIGNATURE \_\_\_\_\_

NAME \_\_\_\_\_  
(IN CAPITALS)

**N.B. MAKE SURE YOU INDEX ALL THE ATTACHMENTS FOR EASE OF IDENTIFICATION**

| Remunerable document required for tender evaluation purposes. Failure to submit the following applicable documents may result in the bid offer being disqualified from further consideration. |   |                          |
|---|---|--------------------------|
| 1.  | Authority for signatory   | Please tick if submitted |
| 2.  | MBD 4 Declaration of interests  | Please tick if submitted |
| 3.  | MBD 6.1 Preference claim in terms of the preferential procurement regulations | Please tick if submitted |
| 4.  | MBD 8 Declaration of bidder's past supply chain management practices          | Please tick if submitted |
| 5.  | MBD 9 Certificate of independent Bid determination                            | Please tick if submitted |
| 6.  | Form of offer and acceptance (agreement)                                      | Please tick if submitted |
| 7.  | Municipal Rate & Taxes as requested above                                     | Please tick if submitted |
| 8.  | Lease agreement with landlord's municipal rates and taxes as requested above  | Please tick if submitted |
| 9.  | Copy of CSD full report   | Please tick if submitted |
| 10.   | Partnership/JV agreement  | Please tick if submitted |

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|     |   |                          |
|-----|---|--------------------------|
| 11. | Authority of Signatory  | Please tick if submitted |
| 12. | BBBEE for Specified Goals verification                                      | Please tick if submitted |
| 13. | Certificate of registration/accreditation/Authorities in the relevant field | Please tick if submitted |

....THE END.....

Initial here: \_\_\_\_\_