



## éDumbe Local Municipality

### PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF MUNICIPALITY/ MUNICIPAL ENTITY)

BID NUMBER:	<b>EDUMT07/2022/23</b>	CLOSING DATE:	<b>08 July 2022</b>	CLOSING TIME:	<b>12H00</b>
DESCRIPTION	<b>Short term Insurance: 36 month contract</b>				
THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (MBD7).					

BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT :

**RECEPTION AREA**

**EDUMBE MUNICIPALITY**

**10 HOOG STREET**

**PAULPIETERSBURG**

**3180**

#### SUPPLIER INFORMATION

NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
TAX COMPLIANCE STATUS	TCS PIN:		OR	CSD No:	
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE [TICK APPLICABLE BOX]	Yes		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	Yes	
	No			No	

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

<p>ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?</p>	<p>Yes No  [IF YES ENCLOSE PROOF]</p>	<p>ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?</p>	<p>Yes No  [IF YES, ANSWER PART B:3 ]</p>
<p>TOTAL NUMBER OF ITEMS OFFERED</p>		<p>TOTAL BID PRICE</p>	<p>R</p>
<p>SIGNATURE OF BIDDER</p>	<p>.....</p>	<p>DATE</p>	
<p>CAPACITY UNDER WHICH THIS BID IS SIGNED</p>			
<p><b>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO:</b></p>		<p><b>TECHNICAL INFORMATION MAY BE DIRECTED TO:</b></p>	
<p>DEPARTMENT</p>	<p>SCM</p>	<p>DEPARTMENT</p>	<p>SCM</p>
<p>CONTACT PERSON</p>	<p>ZP Nkambule</p>	<p>CONTACT PERSON</p>	<p>BONISANI</p>
<p>TELEPHONE NUMBER</p>	<p>034 995 1650</p>	<p>TELEPHONE NUMBER</p>	<p>034 995 1650</p>
<p>FACSIMILE NUMBER</p>	<p>034 995 1192</p>	<p>FACSIMILE NUMBER</p>	<p>034 995 1192</p>
<p>E-MAIL ADDRESS</p>	<p><a href="mailto:nkambulep@edumbe.gov.za">nkambulep@edumbe.gov.za</a></p>	<p>E-MAIL-ADDRESS <a href="mailto:buthelezibw@edumbe.gov.za">buthelezibw@edumbe.gov.za</a></p>	

**PART B**  
**TERMS AND CONDITIONS FOR BIDDING**

**1. BID SUBMISSION:**

- 1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
- 1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED-(NOT TO BE RE-TYPED) OR ONLINE
- 1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.

**2. TAX COMPLIANCE REQUIREMENTS**

- 2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
- 2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.
- 2.3 APPLICATION FOR THE TAX COMPLIANCE STATUS (TCS) CERTIFICATE OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE WWW.SARS.GOV.ZA.
- 2.4 FOREIGN SUPPLIERS MUST COMPLETE THE PRE-AWARD QUESTIONNAIRE IN PART B:3.
- 2.5 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
- 2.6 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
- 2.7 WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.

**3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS**

- 3.1. IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?  
 YES  NO
- 3.2. DOES THE ENTITY HAVE A BRANCH IN THE RSA?  
 YES  NO
- 3.3. DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?  
 YES  NO
- 3.4. DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?  
 YES  NO

3.5. IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?

YES  NO

IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 ABOVE.

NB: FAILURE TO PROVIDE ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE.

SIGNATURE OF BIDDER: .....

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

DATE: .....

# eDumbe Municipality

10 Hoog Street  
Private Bag X308  
PAULPIETERSBURG 3180



☎ : (034) 995 1650  
☎ : (034) 995 1192  
edumbekz261@mweb.co.za

ALL CORRESPONDENCE TO BE ADDRESSED TO THE MUNICIPAL MANAGER

## BID NOTICE AND INVITATION AWARD

Bids are hereby invited from suitable service providers of the following eDumbe Local Municipality projects:

PROJECT NO	PROJECT DESCRIPTION	CONTRACT DURATION	POINT SYSTEM	CIDB GRADING	CLOSING DATE
Bid No: EDUMT07/2022/23	Short term Insurance	36 MONTHS	80/20	N/A	08 July 2022
Bid No: EDUMT08/2022/23	Panel of service providers to hire plant and equipment as and when required	36 MONTHS	80/20	N/A	08 July 2022
Bid No: EDUMT09/2022/23	Panel of service providers for plant, fleet and equipment maintenance as and when required	36 MONTHS	80/20	N/A	08 July 2022
Bid No: EDUMT10/2022/23	Panel of service providers for electrical maintenance services as and when required	36 MONTHS	80/20	2EB or 2EP or higher	08 July 2022

Bid documents may be downloaded through the municipal website on [www.edumbe.gov.za](http://www.edumbe.gov.za) or on the national treasury website on [www.etenders.gov.za](http://www.etenders.gov.za) from **Wednesday 22 June 2022**. Bid documents must be submitted in a sealed envelope clearly marked with the bid number, closing date and, dropped off in the tender box at, **eDumbe Local Municipality, 10 Hoog Street Paulpietersburg, 3180** by no later than **12H00 on Friday 08 July 2022**. All quotes must be submitted on the official forms – (Not to be retyped). This bid is subject to the general conditions of contract (GCC) and any other special conditions of contract.

**THE FOLLOWING ARE MANDATORY:** CSD summary report, valid tax clearance or SARS login pin, a certified copy of the most recent municipal account in which the business is registered or proof of residence if residing in rural areas, copies of ID of members of the entity, B-BBEE Certificate/ Affidavit and Certified copy of CIPRO e.g. CK certificates. Bidders are requested to sign where necessary and initial each page on the Bid Documents.

This proposal will be evaluated in terms of the 80/20 Preferential Procurement Point system where 80 points are for functionality and price, and 20 points are for BBBEE according to the said legislation. Late tenders will not be accepted and the eDumbe Local Municipality reserved the right not to make an award. Failure to comply with the above conditions will invalidate your offer.

**Kindly note that the successful bidder will be subjected to a screening process prior to the bid being awarded, should it be discovered that a successful bidder provided misleading information he/she will be disqualified with immediate effect.**

Enquiries are to be directed to Miss ZP Nkambule at 034 995 1650 (SCM) or Mr. MB Buthelezi at 034 995 1650 (Technical)

  
**JFK KHUMALO**  
**ACTING MUNICIPAL MANAGER**

**FORM OF OFFER**

The Municipal Manager  
P / Bag X 308  
PAULPIETERSBURG  
3180

Sir,

I/We \_\_\_\_\_ offer to **PROVIDE**  
**SHRT TERM INSURANCE SERVICES:** in accordance with the required specifications /  
scope of work for an amount rate of:-

Rate:  _____
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**Management fee/ rate**

Rate:  _____
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Until such time that a formal agreement is compiled and accepted, these tenders will be in conjunction with your acceptance or the persons acting on your behalf and will be a binding contract between both parties.

Value added tax (VAT) be excluded in the prices. The price be valid for 2 (two) months after being awarded.

I/We understand that the Council is not bound to accept the lowest or any tender received.

The Tenderer, identified in the Offer Signature below, has examined the documents listed in the Tender Data and addenda (if applicable) and by submitting this offer has accepted the Conditions of Tender.

By the representative of the Tenderer, deemed to be duly authorized, signing this part of this Form of Offer and Acceptance, the Tenderer offers to perform all of the obligations and liabilities of the Contractor under the Contract including compliance with all its terms and conditions according to that their true intent and meaning for an amount determined in accordance with the Conditions of Contract identified in the Contract Data.

Yours faithfully,

For : \_\_\_\_\_

Address : \_\_\_\_\_

Upon the terms set out in the conditions of tender, I/We hereby acknowledge:-

1. That I/We have read and acquainted myself/ourselves with the terms and conditions of tender and understand the purpose thereof and agree that all such conditions shall form part of this tender;
2. that this offer is irrevocable for a period of 6 (six) months from the date fixed for the opening of tenders and may be accepted in writing by the eDumbe Municipality, at any time during that period, which acceptance, together with this tender shall constitute a binding agreement of purchase and sale between the eDumbe Municipality and myself/ourselves.

I/We understand that the Council is not bound to accept the lowest or any tender it may receive.

**THE CONDITIONS OF TENDER I/WE READ AND ACCEPT**

**Signature :( of person authorized to sign the tender on behalf of the Tenderer):**

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**SIGNATURE**

**Name (of signatory in capitals)** : \_\_\_\_\_

**Name of Tenderer : (organization)** : \_\_\_\_\_

**Address** : \_\_\_\_\_  
\_\_\_\_\_

**Telephone Number** : \_\_\_\_\_

**Fax Number** : \_\_\_\_\_

**Witness Signature** : \_\_\_\_\_

**Witness Name (in Capitals)** : \_\_\_\_\_

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

**ACCEPTANCE (This is completed by the Municipality and not the Tenderer)**

By signing this part of the Form of Offer and Acceptance, the Employer identified below accepts the Tenderers 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 Tender's Offer shall form an agreement between the Employer and the Tenderer upon the terms and conditions contained in this Agreement and in the Contract that is the subject of this Agreement.

**Signature of MM** : \_\_\_\_\_

**Name (in capitals)** : MR JFK KHUMALO

**Capacity** : MUNICIPAL MANAGER

**Name of Employer** : éDUMBE MUNICIPALITY

**Address** : P/ BAG X 308, PUALPIETERSBURG, 3180

**Witness Signature** : \_\_\_\_\_

**Name (in capitals)** : \_\_\_\_\_

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

# SUPPLY CHAIN MANAGEMENT UNIT

## PROCUREMENT – TERMS OF REFERENCES – SERVICES

### TERMS OF REFERENCE

#### CLUSTER: FINANCE

#### DESCRIPTION: SHORT TERM INSURANCE AND RISK MANAGEMENT SERVICES

##### 1. PURPOSE

The purpose is to appoint an Intermediary with experience in the municipal short term insurance field to provide Short Term Insurance and Risk Services to council for the period \_\_\_\_\_ to \_\_\_\_\_ with an annual performance review based on deliverables.

##### 2. BACKGROUND

Council must minimize its risks by ensuring the allocation of risk to the party best suited to manage risk, and all its assets that are insured under the following asset classes:

- Buildings combined
- Office contents
- Business all risks
- Theft
- Money
- Commercial Crime
- Stated Benefits
- Electronic equipment
- Motor Fleet
- Public and employees liability
- Marine and aircraft
- Contractors All Risk
- Business Interruption
- Glass
- Accidental Damage
- Goods in Transit
- Group Personal Accident
- Machinery Breakdown
- Directors and Officers Liability
- SASRIA for Councilors
- SASRIA

### 3. CONTRACT OBJECTIVES, ASSUMPTIONS AND RISKS

Tenders may only be submitted on the official tender format.

1. Bidders may approach all service providers who comply with the relevant statutory solvency and related requirements.
2. Bidders' proposals should be accompanied by a detailed summary of the salient features of their recommended insurance and risk mitigation structures.
3. Support for the bidders' proposals should be evidenced by confirmation of agency agreements with insurers.
4. This tender is on a broker fee basis and all underwriting information will be given to the appointed broker to approach the insurance market for terms.
5. All fees are to be rounded off to the next full rand, the successful bidder will be given all required underwriting information once service level agreement has been signed with the Municipality.
6. Bidders' proposals should be accompanied by a detailed broker fees to be charged in Year 1.
7. The bidder must submit their BEE rating done by an external independent rating agency which is accredited by SANAS or relevant affidavit.
8. The bidder must provide proof of placing assets above R20 billion Rands.
9. The bidder must provide proof of access to Lloyd's Market.
10. The bidder must have Professional Liability and Fidelity Guarantee cover of R500 Million.
11. The bidder must have 10 years' experience in placing Municipal and Public sector clients.
12. Will the bidder be outsourcing more than 25% of their services to other parties? (If yes, please provide equity ownership and HDI status of the beneficiary partner(s) to whom part of the contract will be outsourced). Also indicate which portion of the service will be outsourced
13. Name five local authorities where the bidder are applying risk management, risk control and risk financing solutions to (attach proof)?
14. Has the bidder been appointed in the past (3) three years as an Intermediary for short term insurance on a portfolio in excess of R20 billion assets. (if yes, must provide the names of these clients)
15. Has the bidder been appointed as an Intermediary for short term insurance on a municipal portfolio in the past 3 (three) years? (if yes, must provide the names of these clients)
16. Has the bidder dealt with individual claims in excess of R250 000 in the past 3 (three) years? (if yes, must provide the names of these clients)
17. Does the bidder have an electronic insurance claims handling system?
18. Has this electronic insurance claims handling system been implemented with the bidders' other clients? (if yes, must provide the names of these clients)
19. Failure to comply with the above requirements may render the Tender invalid at the option of the Council.
20. This contract will be valid from \_\_\_\_\_ to \_\_\_\_\_.

## **4. SCOPE OF THE WORK**

### **4.1. Terms of appointment**

The appointment of an Intermediary shall be for a 3 year period. It will be expected from the Intermediary to enter into a performance agreement for the period of appointment with the municipality to achieve this goal. Should the service provider or intermediary not perform according to the agreement, the municipality reserves its right to terminate the contract.

### **4.2. Contract Objectives, Assumptions and Risks**

- Tenders may only be submitted on the official tender format
- Tenderers may approach all service providers complying with the relevant statutory solvency and other requirements
- Tenderers proposals should be accompanied by a detailed summary of their recommended insurance and risk mitigation structure(s)
- Support for the tenderers proposals should be evidenced by a signed participation confirmation from the Service Provider(s)/Insurers/Reinsurers who will support their recommended structure and the terms, conditions and exceptions proposed by tenderer.
- The tenderer must disclose the Service Provider(s)/Insurer or consortium of service providers on each policy wording as indicated in tender documents.
- Failure to comply with the above requirements may render the Tender invalid at the option of the council.

This contract will be valid for the period of three years from the date of appointment

### **4.3. Services required**

Key Performance	Deliverable
1. Post renewal	1.1 Assist in scrutinising the premium invoices for correctness as per underwriters tender
	1.2 Assist with the finalisation and submission of policy documentation and endorsements
	1.3 Preparation and submission of executive insurance summary
	1.5 Preparation and submission of executive insurance summary
	1.6 Workshopping of executive insurance summary with ..... <b>Municipality</b> insurance and risk management officials to ensure proper understanding of policy wording, limits excesses, categories and sections within portfolio.
2. Claims Management system	<p>2.1 The system should have the following minimum requirements:</p> <ul style="list-style-type: none"> <li>- The system should be web based</li> <li>- The system should be windows formats</li> <li>- The system should be able to store documents in any of the windows formats</li> <li>- The system should function on a real time basis</li> <li>- The system should be fax and email integratable</li> </ul> <p>The system should be able to generate reports and management information on an as and when required basis</p>
	2.1 Attendance of ad - hoc claims management meetings as and when required with ..... <b>Municipality</b> or underwriters
3. Liaison between the insurance claims administration services provider and ..... <b>Municipality</b>	3.2 Attendance of monthly portfolio and loss control meetings as and when required (to be facilitated by account executive)
	3.3 Provide expert insurance related or underwriting advice to the ..... <b>Municipality</b> upon request
	3.4 Report to ..... <b>Municipality</b> on claims statistics as and when required (weekly or monthly)

	3.5 Submission of claims analysis and age analysis reports
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4. Loss control and risk management	4.2 Formulate proposals to remedy loss problem areas in monthly report format
	4.3 Assist in applying / introducing remedial measures
	4.4 Pro - active management of loss control and risk preventative measures
4.3.1. n s u	4.5 Develop, negotiate and implement loss control benchmarks of the management and measurement of loss control measures implemented
r e	4.6 Reporting on achievement of benchmarks and actual results
5. Risk Evaluation	5.2 Complete uninsurable risk evaluation process
v a	5.3 Submit report with proposed remedial actions
l	5.4 Implementation of remedial actions
u e	5.5 Review ..... <b>Municipality's</b> exiting underwriting questionnaires to assist in compiling new ones where required
6. Run - up to next renewal	6.1 Verification / review exposures, limits, sum insureds, risk financing structures and advise on possible / improvements adjustments
c l a	6.2 Participates in advisory capacity during renewal negotiations between ..... <b>Municipality</b> and underwriters. Formulate opinion and suggestions in report format
i m s	6.3 Benchmark renewal quotes from ..... <b>Municipality's</b> appointed underwriters by obtaining and comparing quotes in the open market. Supply written report on findings.

Endorsements if necessary will be done during the year.  
experience

#### 4.4 Contract Objectives, Assumptions and Risks

- Tenders may only be submitted on the official tender format
- Tenderers may approach all service providers complying with the relevant statutory solvency and other requirements
- Tenderers proposals should be accompanied by a detailed summary of their recommended insurance and risk mitigation structure(s)
- Support for the tenderers proposals should be evidenced by a signed participation confirmation from the Service Provider(s)/Insurers/Reinsurers who will support their recommended structure and the terms, conditions and exceptions proposed by renderer.

- The tenderer must disclose the Service Provider(s)/Insurer or consortium of service providers on each policy wording as indicated in tender documents.
- Failure to comply with the above requirements may render the Tender invalid at the option of the council.
- This contract will be valid for the period of three years from the date of appointment.

#### **4.5 Risk Services**

Bidders must supply proposed solutions pertaining to the advice, recommendations in terms of service delivery, regulations and insurability, amongst others should at least include:

- Pricing model
- Risk Management framework
- List of Deliverables

### **5. MINIMUM REQUIREMENTS**

**The following are minimum requirements:**

- South African based Insurer agency contract (Attach Proof)
- Valid Tax Clearance Certificate
- Registration with the FSCA/FSB (Attach Proof)
- Registration of Financial Intermediaries Association (FIA) (Attach Proof)
- Registration with The Institute of Risk Management - South Africa (IRMSA) (Attach Proof)
- BBBEE accreditation . (Attach Proof)
- Institute of independent directors' certification for the entity and directors
- Proof of Professional Indemnity of R500 Million
- Proof of access to Lloyds Market
- Provide cv's with contactable references
- Provide B degree in Insurance and Risk Management for Accounts Manager and Director(s)
- Provide confirmation letters of three of the highest value claims in excess of R 20 Million
- Provide reference letters where the broker has conducted brokerage services and claims management services

**Non - adherence to these minimum requirements will result in disqualification of the tenderer.**

#### **1. REPORTING, MONITORING, EVALUATION**

The successful bidder needs to report on a monthly basis on the progress on all claims, risk services matters and other general matters raised. A monthly meeting needs to be scheduled with the relevant officials directly dealing with the insurance portfolio of the municipality (insurance clerk) as well as the risk officer to discuss matters of emphasis.

## 2. EXPECTED OUTPUTS AND OUTCOMES

The successful bidder must provide the council with full coverage on all asset classes as per risk management strategy, deductibles, policy wording and insurers as mentioned in the schedules provided for a period of 36 months.

## 3. REQUIRED DOCUMENTS

All tenderers need to be registered with the following institutions:

- Financial Services Board (FSB)
- Financial Intermediaries association (FIA)
- The Institute of Risk Management - South Africa (IRMSA)
- Membership Certificate of Institute of Directors
- Professional indemnity of R 500 000 000

## 4. INTELLECTUAL PROPERTY

The information of the tenderer will be treated as confidential and remain the property of the bidder.

## 5. REPRESENTATIVE

Proof of registered South African representative must be provided.

## 6. EVALUATION CRITERIA

Acceptable bids will be evaluated by using a two-phased bidding system that awards points on the basis of 90 points for bid price/ functionality and 10 points for B-BBEE status.

The 90 points will be divided into 90 for functionality and 10 for pricing, while the functionality will be evaluated as follows:

CRITERIA	DESCRIPTION	SUB-SCORE	SCORE
1. Experience of the bidding entity in the insurance industry.	<u>Years in the Field:</u> 05 = 0 10 = 2 16 = 5		10
2. Claims administration web system	<ul style="list-style-type: none"><li>• Effective and efficient claims administration web system.</li><li>• Bidder to provide recommendation letters from the client (two points per letter).</li><li>• Bidder to provide claims procedure and documented</li></ul>		10

	relevant forms		
3. Risk Management <b>(Bidders should submit a proof on relevant experience)</b>	Understanding of Risk Management Strategy and provide letters of recommendation. 0-1=5 2-3=10 3-5=15		5
4. Public Sector Experience <b>(Bidders should submit appointment letter)</b>	Bidders should submit appointment letter based on similar services: 0-5=3 6-10=5 11-15=8 16-20=10 50-100=15		15
5. Account Manager: <b>(minimum two, with a minimum of 16 years' experience)</b>	The bidder must provide the following: <ul style="list-style-type: none"> <li>• CV's <b>(with years of experience and contactable references)</b></li> <li>• BCom degree <b>(Insurance &amp; Risk Management and/or Accounting)</b></li> <li>• FAIS accreditation <b>(RE 1 &amp; 5)</b></li> <li>• IODSA Certificate</li> <li>• IRMSA Certificate</li> <li>• Matric</li> </ul>		10
6. Reinsurance Specialist <b>(with a minimum of 15 years' experience)</b>	The bidder must provide the following: <ul style="list-style-type: none"> <li>• CV <b>(with years of experience and contactable references)</b></li> <li>• BA Degree</li> <li>• FAIS Regulatory Exam level 5</li> <li>• Postgraduate Certificate Environmental Management NQF level 9</li> <li>• IISA Membership</li> <li>• Matric</li> </ul>		10

<p>7. Underwriting Manager <b>(with a minimum of 20 years' experience)</b></p>	<p>The bidder must provide the following:</p> <ul style="list-style-type: none"> <li>• CV (with years of experience and contactable references)</li> <li>• B.A (Art), Risk Management NQF level 6</li> <li>• Advanced Insurance Practice NQF level 6</li> <li>• Short-Term Insurance NQF level 5</li> <li>• IISA Certificate</li> <li>• FAIS Accredited (RE 1 &amp; RE 5)</li> <li>• Matric</li> </ul>		<p>10</p>
<p>8. Claims Manager <b>(with a minimum of 15 years' experience)</b></p>	<p>The bidder must provide the following:</p> <ul style="list-style-type: none"> <li>• CV <b>(with years of experience and contactable references)</b></li> <li>• BCom degree (Accounting &amp; Auditing)</li> <li>• Short term NQF level 5</li> <li>• FAIS Accredited (RE 5)</li> <li>• Programme in Risk Management NQF Level 6</li> <li>• Matric</li> </ul>		<p>10</p>
<p>9. The bidding entity must provide proof of placing assets in above R20 Billion</p>	<p>Bidders should submit confirmation from the client (two points per letters).</p>		<p>10</p>
<p>10. Professional Indemnity &amp; Fidelity Guarantee <b>(minimum 500 million)</b></p>	<p>Bidder must provide confirmation letter / Schedule from the insurer</p>		<p>15</p>

**Bidders must gain a minimum of 70% for functionality before they will be further evaluated. It is important to note that due to the critical nature of the functionality aspect of this tender, award of points under functionality will not be done proportionate to the degree of compliance or non-compliance with the required specification or requirement. Points will be allocated for full compliance and no points will be allocated for partial or non-compliance.**

## CONTRACT NEGOTIATIONS

Negotiations to reach agreement on the contract will be held at the following address:

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Negotiations may include discussion on the proposed approach, work plan, staffing, consortium compositions, deliverables and pricing and any other matters of concern to the Institution. The outcome of these negotiations will form part of the contract.

In the event the negotiations fail, the Institution will invite the bidder with the second highest score to contract negotiations.

## INFORMATION TO BIDDERS

Please note that the proposal will be adjudicated in terms of the Preferential Procurement Policy Framework Act of 2000 and the Preferential Procurement Regulations, 2011.

90/10 preferential point system will apply

Price and Functionality	90
B – BBEE	10
<b>Total</b>	<b>100</b>

**Approach and Methodology (1,2,3)** : The criteria assesses aspects such as method in managing portfolio, approach to performing tasks set out in Terms of Reference (TOR) proposed improvements, project implementation plan and project organizational structure.

**Proven Track record (1,2,3,4,5,6)** : The criterion assesses aspects such as history of bidder's experience in similar projects i.e. Municipal Insurance & Risk Solutions, including reference projects and level of success outcome.

### Quality of Bid Proposal (1, 2, 3, 4, 5, 6, 7, 8):

- i) PPPFA and associated regulations: The criteria assesses aspects relating to the extent of understanding the TOR/ specifications, completeness of proposal and level of details provided, policy wording and innovation.
- ii) Level of professional supervision

Points will be allocated for B-BBEE status in the following manner

B-BBEE Status Level of Contributor	Number of Points
1	10
2	9
3	8
4	5
5	4
6	3
7	2
8	1
Non – compliant contributor	0

ANNEXURE:

A. Tender Document

**COMPILED BY:**

**DATE:**

-----

-----Name and Surname

**YYYYMMDD**

**APPROVED/NOT APPROVED**

**DATE:**

-----

-----

**Executive Director: Cluster**

**YYYYMMDD**

**APPROVED/NOT APPROVED**

**DATE:**

-----

-----

**Municipal Manager:**

**YYYYMMDD**

***REQUEST FOR PROPOSAL -***

***INTERMEDIARY SERVICES RELATED TO SHORT TERM INSURANCE AND RISK SERVICES***

***For***

\_\_\_\_\_ ***MUNICIPALITY***

***CLOSING DATE***

\_\_\_\_\_

## INVITATION TO TENDER

You are hereby invited to submit proposals in respect of our Insurance Portfolio and Risk Services based on the following conditions:

1. Your proposal must be submitted by no later than \_\_\_\_\_ on \_\_\_\_\_
2. No proposal received after this time will be considered.
3. Particulars of property, sums insured and limits of indemnity are based on the existing sums insured/ limits.
4. If any limitations and/or uncommon conditions and exclusions are to be imposed, this must be stated very clearly in respect of each class of insurance of the policies.
5. Deductibles are to be shown clearly, otherwise the Council will assume that no deductible will apply and this may not be rectified afterwards.
6. Your proposal is to be valid until \_\_\_\_\_ and Insurers will undertake not to amend their terms, but must be assessed annually based on their performance and deliverables.
7. Faxed, e-mailed and telegraphic tenders/copies will not be accepted.

## GENERAL CONDITIONS

### 1. DEFINITIONS

Unless indicated by the context or explicitly stated otherwise, the following expressions will have the following meanings:

- **Local Council/ District/ Local Authority**

.....

- **Proposal**

A proposal for the arrangement of short-term insurance and risk services for the Council at an agreed premium.

- **Tenderer**

Any person or persons or anybody, incorporated or otherwise, making an offer to arrange short-term insurance and risk services for the Council.

- **Contract Period**

This contract will be valid from \_\_\_\_\_ to \_\_\_\_\_, subject to an annual assessment on price and performance deliverables. An extended term of two (2) years is to be negotiated.

### 2. FAILURE TO PERFORM

2.1

- a) The tenderer should fail to arrange the short-term insurance cover with Insurers/Reinsurers/Service Providers stated in the contract;

Or

- b) The council should suffer damage as a result of the tenderer's failure to perform,

### 3. CEDING OF CONTRACT

The tenderer undertakes not to sub-contract or cede this contract, including any portion thereof or interest therein, unless written permission is granted by the council and on such conditions as the council may approve.

**4. ACCEPTANCE**

4.1 Written acceptance of this tender will make the contract binding on both parties.

**5. USE OF OTHER BROKERS/INTERMEDIARIES**

Will you be making use of other service providers or parties? If so, whom, and what is your relationship?

**6. PARTICULARS OF PROFESSIONAL INDEMNITY INSURANCE**

Provide full details of your Professional Indemnity insurance arrangements. State limits of any one occurrence and deductible.

**7. COMMERCIAL CRIME INSURANCE**

Provide full details of your Commercial Crime insurance arrangements.

**8. AUDITED FINANCIAL STATEMENTS**

Please attach a copy of your latest audited financial statements.

**9. SIMILAR PORTFOLIOS (LOCAL AUTHORITIES ONLY)**

9.1 *If you are currently dealing with any similar portfolios, please provide full details, including names of contactable references*

<i>Council</i>	<i>Contact Person</i>	<i>Tel No.</i>	<i>Fax</i>

9.2 *Please provide information of municipal claims in excess of R250 000 handled by you during the past 3 years.*

**10. INSURANCE MARKETS**

- *Which markets do you have access?*
- *Does your proposed market have experience with Local Authorities?*

**11. EMPOWERMENT**

**11.1 BLACK EMPOWERMENT**

Provide a statement on the tenderer's policy regarding empowerment of the previous disadvantage sector and of SME's. The tenderer must comply with the Employment Equity Act No. 55 of 1998.

**11.2 PERSONNEL MANAGEMENT**

Provide a statement on the tenderer's policy covering, inter alia, human resources and labour relations policy, specifically addressing recruitment, training, conditions of service and management of its employees.

**11.3 EQUAL OPPORTUNITIES**

Provide a statement on the tenderer's policy and intention regarding equal opportunities of employment.

**12. OPERATING COMPANY INFORMATION**

Indicate which company, division or branch will be responsible for the handling of our portfolio, if appointed.

**12.1 NAME**

.....  
.....

**12.2 PHYSICAL ADDRESS**

.....

.....  
.....

**12.3 POSTAL ADDRESS**

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

**12.4 TELEPHONE/FACSIMILE NUMBER**

.....  
.....

**12.5 COMPANY/ENTERPRISE INCOME TAX REFERENCE NUMBER**

.....  
.....

**12.6 VAT REGISTRATION NUMBER**

.....  
.....

**12.7 COMPANY REGISTRATION NUMBER**

.....  
.....

**12.8 CHIEF EXECUTIVE**

.....  
.....

**12.9 STRUCTURE OF DIVISION**

.....  
.....

**12.10 ACCOUNT EXECUTIVES**

.....  
.....

**13. PORTFOLIO MANAGEMENT**

13.1 Do you have a Loss Control Resource?  
*Is it In-house or external?*

13.2 Do you have a Risk Finance Resource?  
*Is it in-house or external?*

*Describe fully the services you are able to offer on the field of Risk Management, Risk Control and Risk Financing*

13.3 How would you apply your Resources to our benefit

**14. CLAIMS HANDLING**

14.1 Describe fully the services you are able to offer under this heading.  
14.2 If you consider it applicable, comment upon the role to be undertaken by the Council in connection with the review and settlement of claims.  
14.3 Describe fully the service you are able to offer and your recommended method for self-insurance.

## **15. PROPOSED STRATEGY**

*15.1 Describe your proposed strategy and plan of action based on the information provided, should you be appointed.*

## **16. SERVICE AND REMUNERATION**

*16.1 Service*

*16.1.1 Provide full details of the services you propose providing and the extent of such services.*

*16.1.2 Provide a full-service plan*

*16.2 List your personnel resource level of experience and position that you would use in managing this account if appointed.*

**MBD 4**

**DECLARATION OF INTEREST**

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

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

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

3.2 Identity Number: .....

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

3.4 Company Registration Number: .....

3.5 Tax Reference Number:.....

3.6 VAT Registration Number: .....

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

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

3.8.1 If yes, furnish particulars. ....  
.....

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

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

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

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

3.9.1 If yes, furnish particulars.....

.....

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

3.10.1 If yes, furnish particulars.

.....  
.....

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

3.11.1 If yes, furnish particulars

.....  
.....

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

3.12.1 If yes, furnish particulars.

.....  
.....

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

3.13.1 If yes, furnish particulars.

.....  
.....

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

3.14.1 If yes, furnish particulars:

.....  
.....

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

<b>Full Name</b>	<b>Identity Number</b>	<b>State Employee Number</b>

.....  
**Signature**

.....  
**Date**

.....  
**Capacity**

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

## PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2011

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

**NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF B-BBEE, AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017.**

### 1. GENERAL CONDITIONS

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

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

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

1.3 Preference points for this bid shall be awarded for:

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

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

	<b>POINTS</b>
<b>1.3.1.1 PRICE</b>	<b>80</b>
<b>1.3.1.2 B-BBEE STATUS LEVEL OF CONTRIBUTION</b>	<b>20</b>
<b>Total points for Price and B-BBEE must not exceed</b>	<b>100</b>

1.4 Failure on the part of a bidder to fill in and/or to sign this form and submit a B-BBEE Verification Certificate from a Verification Agency accredited by the South African Accreditation System (SANAS) or a Registered Auditor approved by the Independent Regulatory Board of Auditors (IRBA) or an Accounting Officer as contemplated in the Close Corporation Act (CCA) together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.

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

### 2. DEFINITIONS

2.1 “**all applicable taxes**” includes value-added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies;

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

2.3 “**B-BBEE status level of contributor**” means the B-BBEE status received by a measured entity based on its overall performance using the relevant scorecard contained in the Codes of Good Practice on Black Economic Empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic

Empowerment Act;

- 2.4 “**bid**” means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of services, works or goods, through price quotations, advertised competitive bidding processes or proposals;
- 2.5 “**Broad-Based Black Economic Empowerment Act**” means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- 2.6 “**comparative price**” means the price after the factors of a non-firm price and all unconditional discounts that can be utilized have been taken into consideration;
- 2.7 “**consortium or joint venture**” 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;
- 2.8 “**contract**” means the agreement that results from the acceptance of a bid by an organ of state;
- 2.9 “**EME**” means any enterprise with an annual total revenue of R5 million or less .
- 2.10 “**Firm price**” means the price that is only subject to adjustments in accordance with the actual increase or decrease resulting from the change, imposition, or abolition of customs or excise duty and any other duty, levy, or tax, which, in terms of the law or regulation, is binding on the contractor and demonstrably has an influence on the price of any supplies, or the rendering costs of any service, for the execution of the contract;
- 2.11 “**functionality**” means the measurement according to predetermined norms, as set out in the bid documents, of a service or commodity that is designed to be practical and useful, working or operating, taking into account, among other factors, the quality, reliability, viability and durability of a service and the technical capacity and ability of a bidder;
- 2.12 “**non-firm prices**” means all prices other than “firm” prices;
- 2.13 “**person**” includes a juristic person;
- 2.14 “**rand value**” means the total estimated value of a contract in South African currency, calculated at the time of bid invitations, and includes all applicable taxes and excise duties;
- 2.15 “**sub-contract**” means the primary contractor’s assigning, leasing, making out work to, or employing, another person to support such primary contractor in the execution of part of a project in terms of the contract;
- 2.16 “**total revenue**” bears the same meaning assigned to this expression in the Codes of Good Practice on Black Economic Empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act and promulgated in the *Government Gazette* on 9 February 2007;
- 2.17 “**trust**” means the arrangement through which the property of one person is made over or bequeathed to a trustee to administer such property for the benefit of another person; and
- 2.18 “**trustee**” means any person, including the founder of a trust, to whom property is bequeathed in order for such property to be administered for the benefit of another person.

### 3. ADJUDICATION USING A POINT SYSTEM

- 3.1 The bidder obtaining the highest number of total points will be awarded the contract.

- 3.2 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;.
- 3.3 Points scored must be rounded off to the nearest 2 decimal places.
- 3.4 In the event that two or more bids have scored equal total points, the successful bid must be the one scoring the highest number of preference points for B-BBEE.
- 3.5 However, when functionality is part of the evaluation process and two or more bids have scored equal points including equal preference points for B-BBEE, the successful bid must be the one scoring the highest score for functionality.
- 3.6 Should two or more bids be equal in all respects, the award shall be decided by the drawing of lots.

#### 4. POINTS AWARDED FOR PRICE

##### 4.1 THE 80/20 PREFERENCE POINT SYSTEMS

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

#### 80/20

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

Where

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

$P_t$  = Comparative price of bid under consideration

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

#### 5. Points awarded for B-BBEE Status Level of Contribution

- 5.1 In terms of Regulation 5 (2) and 6 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

B-BBEE Status Level of Contributor	Number of points (80/20 system)
1	20
2	18
3	14
4	12
5	8
6	6

7	4
8	2
Non-compliant contributor	0

- 5.2 Bidders who qualify as EMEs in terms of the B-BBEE Act must submit a certificate issued by an Accounting Officer as contemplated in the CCA or a Verification Agency accredited by SANAS or a Registered Auditor. Registered auditors do not need to meet the prerequisite for IRBA's approval for the purpose of conducting verification and issuing EMEs with B-BBEE Status Level Certificates.
- 5.3 Bidders other than EMEs must submit their original and valid B-BBEE status level verification certificate or a certified copy thereof, substantiating their B-BBEE rating issued by a Registered Auditor approved by IRBA or a Verification Agency accredited by SANAS.
- 5.4 A trust, consortium or joint venture, will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their B-BBEE status level certificate.
- 5.5 A trust, consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.
- 5.6 Tertiary institutions and public entities will be required to submit their B-BBEE status level certificates in terms of the specialized scorecard contained in the B-BBEE Codes of Good Practice.
- 5.7 A person will not be awarded points for B-BBEE status level if it is indicated in the bid documents that such a bidder intends sub-contracting more than 25% of the value of the contract to any other enterprise that does not qualify for at least the points that such a bidder qualifies for, unless the intended sub-contractor is an EME that has the capability and ability to execute the sub-contract.
- 5.8 A person awarded a contract may not sub-contract more than 25% of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level than the person concerned, unless the contract is sub-contracted to an EME that has the capability and ability to execute the sub-contract.

**6. BID DECLARATION**

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

**7. B-BBEE STATUS LEVEL OF CONTRIBUTION CLAIMED IN TERMS OF PARAGRAPHS 1.3.1.2 AND 5.1**

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

**(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 5.1 and must be substantiated by means of a B-BBEE certificate issued by a Verification Agency accredited by SANAS or a Registered Auditor approved by IRBA or an Accounting Officer as contemplated in the CCA).**

**8 SUB-CONTRACTING**

8.1 Will any portion of the contract be sub-contracted? YES / NO (delete which is not applicable)

8.1.1 If yes, indicate:

- (i) what percentage of the contract will be subcontracted? .....
- (ii) the name of the sub-contractor? .....
- (iii) the B-BBEE status level of the sub-contractor? .....
- (iv) whether the sub-contractor is an EME? YES / NO (delete which is not applicable)

**9 DECLARATION WITH REGARD TO COMPANY/FIRM**

9.1 Name of firm :.....

9.2 VAT registration number :.....

9.3 Company registration number :.....

9.4 TYPE OF COMPANY/ FIRM

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

[TICK APPLICABLE BOX]

9.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

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

9.6 COMPANY CLASSIFICATION

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

[TICK APPLICABLE BOX]

9.7 MUNICIPAL INFORMATION

Municipality where business is situated .....

Registered Account Number .....

Stand Number .....

9.8 TOTAL NUMBER OF YEARS THE COMPANY/FIRM HAS BEEN IN BUSINESS?

.....

9.9 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBE status level of contribution indicated in paragraph 7 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I / we acknowledge that:

- (i) The information furnished is true and correct;

- (ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form.
- (iii) In the event of a contract being awarded as a result of points claimed as shown in paragraph 7, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;
- (iv) If the B-BBEE status level of contribution has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –
  - (a) disqualify the person from the bidding process;
  - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
  - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
  - (d) restrict the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, from obtaining business from any organ of state for a period not exceeding 10 years, after the audi alteram partem (hear the other side) rule has been applied; and
  - (e) forward the matter for criminal prosecution

**WITNESSES:**

1. ....

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

2. ....

DATE:.....

ADDRESS:.....

.....

.....

.....

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

- 1 This Municipal Bidding Document must form part of all bids invited.
- 2 It serves as a declaration to be used by municipalities and municipal entities in ensuring that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system.
- 3 The bid of any bidder may be rejected if that bidder, or any of its directors have:
  - a. abused the municipality's / municipal entity's supply chain management system or committed any improper conduct in relation to such system;
  - b. been convicted for fraud or corruption during the past five years;
  - c. willfully neglected, reneged on or failed to comply with any government, municipal or other public sector contract during the past five years; or
  - d. been listed in the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004).
- 4 **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**

Item	Question	Yes	No
4.1	<p>Is the bidder or any of its directors listed on the National Treasury's Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector? (Companies or persons who are listed on this Database were informed in writing of this restriction by the Accounting Officer/Authority of the institution that imposed the restriction after the <i>audi alteram partem</i> rule was applied).</p> <p><b>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.</b></p>	Yes	<u>No</u>
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)? <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	<u>No</u>
4.2.1	If so, furnish particulars:		
4.3	Was the bidder or any of its directors convicted by a court of law (including a court of law outside the Republic of South Africa) for fraud or corruption during the past five years?	Yes	<u>No</u>
4.3.1	If so, furnish particulars:		
<b>Item</b>	<b>Question</b>	<b>Yes</b>	<b>No</b>
4.4	Does the bidder or any of its directors owe any municipal rates and taxes or municipal charges to the municipality / municipal entity, or to any other municipality / municipal entity, that is in arrears for more than three months?	Yes	<u>No</u>
4.4.1	If so, furnish particulars:		
4.5	Was any contract between the bidder and the municipality / municipal entity or any other organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	Yes	<u>No</u>
4.7.1	If so, furnish particulars:		

## CERTIFICATION

I, THE UNDERSIGNED (FULL NAME) .....  
**CERTIFY THAT THE INFORMATION FURNISHED ON THIS  
DECLARATION FORM 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**  
**CERTIFICATE OF INDEPENDENT BID DETERMINATION**

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

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

<sup>2</sup> Bid rigging (or collusive bidding) occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and / or services for purchasers who wish to acquire goods and / or

services through a bidding process. Bid rigging is, therefore, an agreement between competitors not to compete.  
MBD 9

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

I certify, on behalf of: \_\_\_\_\_ that:  
(Name of Bidder)

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign, the bid, on behalf of the bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:
  - (a) has been requested to submit a bid in response to this bid invitation;
  - (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and

- (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder
- 6. The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However communication between partners in a joint venture or consortium<sup>3</sup> will not be construed as collusive bidding.
- 7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
  - (a) prices;
  - (b) geographical area where product or service will be rendered (market allocation)
  - (c) methods, factors or formulas used to calculate prices;
  - (d) the intention or decision to submit or not to submit, a bid;
  - (e) the submission of a bid which does not meet the specifications and conditions of the bid; or
  - (f) bidding with the intention not to win the bid.
- 8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 9. The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 10. I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten

(10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

.....  
Signature

.....  
Date

.....  
Position

.....  
Name of Bidder/Company

**BANKING DETAILS AMENDMENTS FORM**

The eDumbe Local Municipality has adopted a policy of making vendor payments via EFT. To ensure that there are no delays in the processing of payments, ensure that the Electronic funds transfer form and the banking account details form are completed correctly and have the requisite bank authorisations.

**ELECTRONIC FUNDS TRANSFER**

Name of company/ partnership/individual: \_\_\_\_\_

Trading as: \_\_\_\_\_

Reg. No.: \_\_\_\_\_ Tel: \_\_\_\_\_

Fax: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_ Postal code: \_\_\_\_\_

I/ We, the undersigned, hereby authorise and instruct the eDumbe Local Municipality to pay all amounts that may hereafter, from time to time, become due and payable to me/us by the eDumbe Local Municipality by electronically transferring the same to the bank mentioned below for the credit of my/our account detailed below.

I/ We, the undersigned, understand and agree that:

- Any such transfer shall constitute a full and final discharge of the eDumbe Local Municipality's obligation to make such payments to me/ us. The eDumbe Local Municipality shall not be liable to make good any loss. I/ We may suffer consequent upon such transfer pursuant to this authority and instruction.
- This payment authorisation and instruction will be applied to both goods purchased and services rendered.
- This authority and instruction will remain valid unless cancelled by either party upon thirty (30) days written notice. The said notice will only be effective in writing, delivered to the other party at the addresses stated herein and bearing an acknowledgement of receipt by the other party.
- Should any transfer attempted in respect of this authorisation be unsuccessful due to incorrect information supplied by me/ us, I/We agree to pay all bank charges for this transfer attempt.

In the event that the details set out herein should change, I/ We agree to notify the Municipality forthwith.

\_\_\_\_\_  
Name Capacity                      Telephone                      Cell

\_\_\_\_\_  
Signature                              Date

**BANK ACCOUNT TO WHICH PAYMENTS ARE TO BE MADE**

Name in which account is held: \_\_\_\_\_

Name of bank: \_\_\_\_\_

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

Bank clearing number:																			
-----------------------	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Account Number																			
----------------	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

ACCOUNT TYPE: \_\_\_\_\_

**Important:** Please ensure that you have included a **certified copy of your identification** and a **copy of a cancelled cheque or bank statement as per the documents required.**

**SECTION B: BEFORE RETURNING, THIS SECTION MUST BE COMPLETED BY YOUR BANK**

I/We confirm that the above information on the client's account at this bank is correct.

\_\_\_\_\_  
**Signed on behalf of Bank**

Bank Stamp:

\_\_\_\_\_  
Name

\_\_\_\_\_  
Capacity

Note: This information will supersede any previous authorisation and instruction lodged with eDumbe Local Municipality. **Original completed** forms must be hand delivered or posted to the above address. Photocopies or faxed copies will not be accepted.

For Office Use Only	Supplier Code	Captured By(Name)	Initial	Date

\_\_\_\_\_

## SUPPLIERS DATABASE REGISTRATION FORM



DELIVER TO:  
PROCUREMENT SECTION  
EDUMBE LOCAL MUNICIPALITY OFFICES  
10 HIGH STREET  
PAULPIETERSBURG  
3180

OR POST TO:  
THE PROCUREMENT SECTION  
EDUMBE LOCAL MUNICIPALITY OFFICES  
PRIVATE BAG X308  
PAULPIETERSBURG  
3180

All enquiries to be directed to: **The SCM MANAGER**  
Telephone: 0349951650/2  
Fax number: 0349951192  
[buthelzibw@edumbe.gov.za](mailto:buthelzibw@edumbe.gov.za) and [nkosim@edumbe.gov.za](mailto:nkosim@edumbe.gov.za)

### For office use:

Supplier Name	_____		
Edumbe Registration No	_____		
Captured By	_____	Date	_____
Approved by	_____	Date	_____

## IMPORTANT NOTES:

Please read carefully

- To be completed by all vendors seeking registration as an approved supplier.
- Form must be completed in **full** and must be **signed**.
- Suppliers must comply with the registration criteria for registration to be finalised – failure to do so may result in the application being declined.
- Applicants will be contacted via fax and must therefore submit an operating fax number; failure to comply will result in excluding the supplier from the EFT system.
- It should be noted that eDumbe Local Municipality reserves the right to accept or reject any application **without being obliged to give any reasons** in this respect
- Suppliers will **not be notified** whether the application was accepted or not but will be advised of the outcome if telephonically requested
- Documents must be hand delivered at or posted to the above address. Faxed documents will not be accepted.
- Only black pen to be used on completion of this form

## GUIDELINES:

1. Applicants are advised that only **ORIGINAL** eDumbe Local Municipality forms or **PHOTOCOPIES** thereof will be processed. Any document that has been retyped or redrafted will be disregarded and returned to the applicant.
2. It is imperative that only supporting documents with an **ORIGINAL** signature be submitted.
3. All signatures must be commissioned by an authorized Commissioner of Oaths. Failure to do so will result in the applicant **not qualifying** for registration.
4. Suppliers registered on the Suppliers Database **MUST** notify the Supply Chain Management Office of any changes to information provided in the initial eDumbe Local Municipality forms, as captured onto the Suppliers Database. Failure to do so may result in such a supplier being removed from the Suppliers Database and/or the cancellation of contracts awarded to the supplier, on the basis of misrepresentation.

5. Suppliers providing incorrect information or fraudulent in their eDumbe Local Municipality forms will be **disqualified** from bidding and **removed** from the Suppliers Database, in addition to any other action the Province may institute against such a supplier. Furthermore, in the event of the Province being prejudiced financially, it reserves the right to **take legal action** against the supplier.
6. For definitions of terminology used in this document, please refer to the definitions set out in Treasury Regulation 16 A and eDumbe Local Municipality's Supply Chain management Framework.
7. Any **alterations** made by the supplier to its own information inserted on this document, must be **initialled** by the supplier. The use of correcting fluid is prohibited and the use thereof will lead to non-registration of the applicant.
8. Reminding letters will be issued by the eDumbe Local Municipality to suppliers to update their information. It remains the responsibility of the supplier to ensure that their information is updated in the Suppliers Database, therefore if a reminder letter is not received, the supplier must follow up with the eDumbe Local Municipality.

## SUBMISSION OF DOCUMENTATION

The following documents must accompany your application: Please indicate

Documents	Expiry date	YES	NO
Certified copies of Identity Documents (ID) of shareholders			
Valid SARS Tax Clearance Certificate (original documents only)			
Company Registration Documents (e.g. CK)			
Original or Certified Proof of Residence (Municipal Account)			
CIDB Grading Certificate			
Professional Body Affiliation Certificate			
Reference Letters			
Training Institution ( SETA Accreditation Certificate)			
Original Valid Broad-Base Black Economic Empowerment (BBBEE) Certificate			
Copy of bank statement (not older than 3 months) or cancelled cheque for proof of Bank Details			
National Treasury Supplier Central Database Number			

## SECTION 1: PARTICULARS OF THE ORGANISATION

Please note that all information will be treated confidentially.

Where organisation is a joint venture the individual members of the joint venture are to separately provide information on their organisation.

1.1. Registered name of the organisation:

1.2. Trading name:

1.3. Type of organisation: (please tick one)

PTY(Ltd)	<input type="checkbox"/>	CC	<input type="checkbox"/>	Sole Trader	<input type="checkbox"/>	Section 21	<input type="checkbox"/>	Public Company	<input type="checkbox"/>	Other (Specify	<input type="checkbox"/>
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1.4. Company registration number:

1.5. Income tax registration number:

1.6. VAT registration number:

1.7. UIF registration number:

1.8. PAYE number:

1.9. Construction industry development board registration number (CIDB):

1.10. Compensation commissioner registration number:

1.11. (a) Business Postal address:

Box /Bag		
Box/Bag no.		
Town		
	Postal Code:	

(b) Business Physical address

Street No.		
Street Name		
Local Municipality		
Town		
	Postal Code:	

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EMAIL (Office)	
TELEPHONE NUMBER:	
CELL NUMBER:	
FAX NUMBER	

1.12. Contact person (**Full name**) and designation:

Name of the Municipality	
Account Number (A confirmation Letter if your business area does not pay Rates)	

1.13. Contact Details:

1.14. State the municipality in which you're business operates:

Contact for Municipality	
--------------------------	--

1.15. Previous business information (if applicable)

Did your business exist under a different name previously?	
If "yes" what was the previous business name?	
Reason for name change?	

**1.16. Banking details:**

The eDumbe Local Municipality has adopted a policy of making vendor payments via EFT. To ensure that there are no delays in the processing of payments, ensure that the Electronic funds transfer form and the banking account details form are completed correctly and have the requisite bank authorisations.

**1.17. Declaration of Interest**

No bid will be accepted from persons in the service of the state\*.

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.

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

If so, furnish particulars.

\_\_\_\_\_

\_\_\_\_\_

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

If so, furnish particulars.

**ELECTRONIC FUNDS TRANSFER**

Name of company/ partnership/individual: \_\_\_\_\_

Trading as: \_\_\_\_\_

Reg. No.: \_\_\_\_\_ Tel: \_\_\_\_\_

Fax: \_\_\_\_\_

Address:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_ Postal code: \_\_\_\_\_

I/ We, the undersigned, hereby authorise and instruct the eDumbe Local Municipality to pay all amounts that may hereafter, from time to time, become due and payable to me/us by the eDumbe Local Municipality by electronically transferring the same to the bank mentioned below for the credit of my/our account detailed below.

I/ We, the undersigned, understand and agree that:

- Any such transfer shall constitute a full and final discharge of the eDumbe Local Municipality's obligation to make such payments to me/ us. The eDumbe Local Municipality shall not be liable to make good any loss. I/ We may suffer consequent upon such transfer pursuant to this authority and instruction.
- This payment authorisation and instruction will be applied to both goods purchased and services rendered.
- This authority and instruction will remain valid unless cancelled by either party upon thirty (30) days written notice. The said notice will only be effective in writing, delivered to the other party at the addresses stated herein and bearing an acknowledgement of receipt by the other party.
- Should any transfer attempted in respect of this authorisation be unsuccessful due to incorrect information supplied by me/ us, I/We agree to pay all bank charges for this transfer attempt.

In the event that the details set out herein should change, I/ We agree to notify the Municipality forthwith.

\_\_\_\_\_

Name Capacity Telephone/Cell

\_\_\_\_\_

Signature

\_\_\_\_\_

Date

**BANK ACCOUNT TO WHICH PAYMENTS ARE TO BE MADE**

Name in which account is held: \_\_\_\_\_

Name of bank: \_\_\_\_\_

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

Bank clearing number:														
-----------------------	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Account Number														
----------------	--	--	--	--	--	--	--	--	--	--	--	--	--	--

ACCOUNT TYPE: \_\_\_\_\_

**Important:**

Please ensure that you have included a certified copy of your identification and a copy of a cancelled cheque or bank statement as per the documents required.

**SECTION B: BEFORE RETURNING, THIS SECTION MUST BE COMPLETED BY YOUR BANK**

I/We confirm that the above information on the client's account at this bank is correct.

\_\_\_\_\_  
Signed on behalf of Bank

Bank Stamp:

\_\_\_\_\_  
Name

\_\_\_\_\_  
Capacity

Note: This information will supersede any previous authorisation and instruction lodged with eDumbe Local Municipality. **Original completed** forms must be hand delivered or posted to the above address. Photocopies or faxed copies will not be accepted.

For Office Use Only	Supplier Code	Captured By(Name)	Initial	Date

## SECTION 2: SERVICE TYPE AND CATEGORIES

Vendor type and services categories					
Please indicate your Service Type (ONE ONLY) by marking the appropriate box with an X.					
Code	Service Type	X	Code	Service Type	X
Cons	Consultant		Supp	Supplier	
Cont	Contractor				
Service providers may choose a MAXIMUM OF 5 (five) categories by marking the appropriate box with an X					
* If more than 5 services are indicated, only the first five will apply					
**If your service is not indicated, write it clearly under "OTHER"					
<b>300</b>	<b>Construction Equipment And Supplies</b>	<b>X</b>	<b>100</b>	<b>General Services</b>	<b>X</b>
301	Construction equipment		101	Catering	
302	Building materials		102	Conferencing and Event management	
303	Electrical materials		103	Cleaning and Gardening Services	
304	Plant hire equipment		104	Courier	
305	Plumbing materials		105	General Maintenance	
<b>500</b>	<b>Construction Services</b>	<b>X</b>	106	Laundry and Dry Cleaning	
501	Civil		107	Pest Control	
502	Electrical		108	Photographic and Graphic Design	
503	Mechanical		109	Printing	
<b>400</b>	<b>Professional Services</b>	<b>X</b>	110	Security and Safety	
401	Accounting, Auditing, Financial		111	Transport (buses / minibuses)	
402	Architectural and Quantity Surveying		<b>200</b>	<b>Office and Facilities Supplies</b>	<b>X</b>
403	Arts and Culture		201	Audio systems	
404	Auctioneering		202	Clothing and Corporate gifts	
405	Consulting Civil Engineer		203	Fire protection equipment	
406	Consulting Electrical Engineer		204	Groceries	
407	Consulting Geo-technical Engineer		205	IT- hardware/ software	
408	Consulting Mechanical Engineer		206	Office furniture and equipment	
409	Fire and Safety		207	Stationery	
410	GIS and Mapping and Data Collection		<b>600</b>	<b>Vehicles</b>	<b>X</b>
411	Occupational Health & Safety		601	Alarms and tracking systems	
412	Land and Property Valuers		602	Mechanical repairs and maintenance	
413	Land Surveying		603	Electrical repairs and maintenance	
414	Legal Services		604	Panel Beating	
415	Recruitment		605	Spares and parts	
416	Town and Regional Planners		606	Towing	
417	Training and Development		607	Vehicle dealership and Fleet Management	
418	Translation and Interpretation		<b>800</b>	<b>Other</b>	<b>X</b>
<b>700</b>	<b>Miscellaneous Supplies</b>	<b>X</b>	801		
701	Functions Equipment Hire		802		
702	Sports		803		

**SECTION 3: EVALUATION SECTION**

**Failure to complete this section will result in the application being declined.**

3.1. Please indicate size of the organisation based on annual turnover in the past three year's turnover:

3.2. Please provide total number of staff members employed by the company:

**SECTION 4: REFERENCES**

List at least three completed projects and their contactable reference. List per each type of service registered for:

PROJECT NAME	INSTITUTION NAME	AWARD AMOUNT	REFERENCE NAME AND CONTACT	DATE AWARDED
PROJECT NAME	INSTITUTION NAME	AWARD AMOUNT	REFERENCE NAME AND CONTACT	DATE AWARDED
PROJECT NAME	INSTITUTION NAME	AWARD AMOUNT	REFERENCE NAME AND CONTACT	DATE AWARDED

PROJECT NAME	INSTITUTION NAME	AWARD AMOUNT	REFERENCE NAME AND CONTACT	DATE AWARDED
PROJECT NAME	INSTITUTION NAME	AWARD AMOUNT	REFERENCE NAME AND CONTACT	DATE AWARDED
PROJECT NAME	INSTITUTION NAME	AWARD AMOUNT	REFERENCE NAME AND CONTACT	DATE AWARDED

PROJECT NAME	INSTITUTION NAME	AWARD AMOUNT	REFERENCE NAME AND CONTACT	DATE AWARDED
PROJECT NAME	INSTITUTION NAME	AWARD AMOUNT	REFERENCE NAME AND CONTACT	DATE AWARDED
PROJECT NAME	INSTITUTION NAME	AWARD AMOUNT	REFERENCE NAME AND CONTACT	DATE AWARDED

**NB: A supplier can attach additional references per service type. References will be contacted, thus inaccurate contact details or poor service delivery may be used as valid grounds for registration being declined.**

**SECTION 5: DECLARATION**

**I the undersigned hereby declare that the information given in this document is to the best of my knowledge true, and correct in every respect.**

Full names of owner or supplier representative: \_\_\_\_\_

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

Signed at: \_\_\_\_\_

Supplier name: \_\_\_\_\_

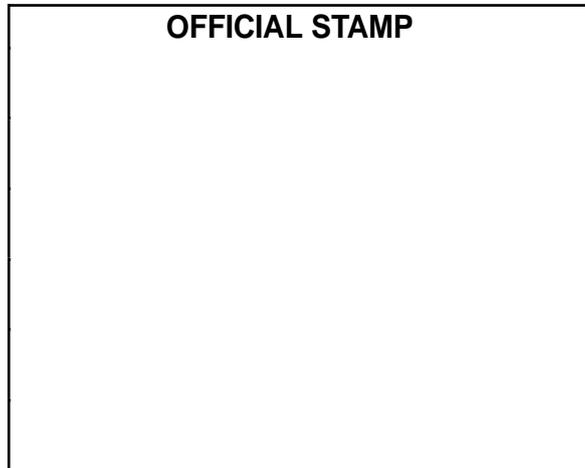
**SIGNED AND AFFIRMED BEFORE ME (COMMISSIONER OF OATHS):**

Full name: \_\_\_\_\_

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

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



### 3. AUTHORITY TO SIGN A BID

#### 1. COMPANIES AND CLOSE CORPORATIONS

- 1.1. If a Bidder is a COMPANY, a certified copy of the resolution by the board of directors, duly signed, authorizing the person who signs this bid to do so, as well as to sign any contract resulting from this bid and any other documents and correspondence in connection with this bid and/or contract on behalf of the company must be submitted with this bid, that is, before the closing time and date of the bid
- 1.2. In the case of a CLOSE CORPORATION (CC) submitting a bid, a resolution by its members, authorizing a member or other official of the corporation to sign the documents on their behalf, shall be included with the bid.

#### PARTICULARS OF RESOLUTION BY BOARD OF DIRECTORS OF THE COMPANY/MEMBERS OF THE CC

Date Resolution was taken	
Resolution signed by (name and surname) Capacity	
Name and surname of delegated Authorised Signatory	
Capacity	
Specimen Signature	

Full name and surname of ALL Director(s) / Member (s)			
1.		2.	
3.		4.	
5.		6.	
7.		8.	
Is a CERTIFIED COPY of the resolution attached?		YES	NO
SIGNED ON BEHALF OF COMPANY / CC:		S DATE:	
PRINT NAME:			
WITNESS 1:		WITNES	

S 2:

---

**2. SOLE PROPRIETOR (SINGLE OWNER BUSINESS)**

I, \_\_\_\_\_, the undersigned, hereby

SIGNATURE:		DATE:	
PRINT NAME:			
WITNESS 1:		WITNESS	

---

confirm that I am the sole owner of the business trading as

2:

**3. PARTNERSHIP**

We, the undersigned partners in the business trading as \_\_\_\_\_  
 \_\_\_\_\_ hereby authorize Mr/Ms \_\_\_\_\_ to sign  
 this bid as well as any contract resulting from the bid and any other documents  
 and correspondence in connection with this bid and /or contract for and on behalf  
 of the abovementioned partnership.

The following particulars in respect of every partner must be furnished and signed by every partner:

Full name of partner		Signature	
SIGNED ON BEHALF OF PARTNERSHIP:		DATE:	
PRINT NAME:			
WITNESS 1:		WITNESS	

2:

**4. CONSORTIUM**

We, the undersigned consortium partners, hereby authorize \_\_\_\_\_  
 \_\_\_\_\_ (Name of entity) to act as lead consortium partner and further authorize  
 Mr./Ms.

\_\_\_\_\_ To sign this offer as well as any contract  
 resulting from this tender and any other documents and correspondence in  
 connection with this tender and / or contract for and on behalf of the consortium.

The following particulars in respect of each consortium member must be provided and signed by each member:

Full Name of Consortium Member	Role of Consortium Member	%	Signature

SIGNED ON BEHALF OF PARTNERSHIP:		DATE:	
PRINT NAME:			
WITNESS 1:		WITNES S 2:	

