***UMZIMVUBU LOCAL MUNICIPALITY***

***PROVINCE OF THE EASTERN CAPE***

***LED & ENVIRONMENTAL MANAGEMENT***

**SUPPLY, DELIVERY & DISTRIBUTION OF AGRICULTURAL INPUTS FOR 15 HA TO THE RESPECTIVE 27 WARDS OF ULM**

**CONTRACT No.: ULM/LED/2018/19/002**

**@**

**KWA BHACA**

|  |
| --- |
| **Bidder****. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .** **Total of the prices inclusive of value added tax: R . . . . . . . . . . . . . . . . . . . . . . . . . .**  |
| ***BIDDER’S CLOSES*** *AT THE OFFICES OF:* ***UMZIMVUBU LOCAL MUNICIPALITY*** *OFFICES* ***MT FRERE*** *AT* ***12H00*** *ON FRIDAY THE ..... AUGUST 2018*Documents are to be delivered by hand in the tender box as no faxed copies will be acceptable; the box is situated at **‘Reception’** of Umzimvubu Municipality, **813 Main Street**, **Mount Frere**.***NO LATE SUBMISSION WILL BE CONSIDERED*** |
| Issued and by:UMZIMVUBU LOCAL MUNICIPALITY813 MAIN STREETMOUNT FRERE 5010Municipal Manager : G.P.T. NotaContact person : M. MatamTelephone : 039 – 255 8500 |

THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2011, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT

# NB: NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE (as defined in Regulation 1 of the Local Government: Municipal Supply Chain Management Regulations)

|  |
| --- |
| THE FOLLOWING PARTICULARS MUST BE FURNISHED(FAILURE TO DO SO MAY RESULT IN YOUR BID BEING DISQUALIFIED) |

NAME OF BIDDER ………………………………………………………………………………………………………………………

POSTAL ADDRESS ………………………………………………………………………………………………………………….

STREET ADDRESS …………………………………………………………………………………………………………………

TELEPHONE NUMBER CODE……………NUMBER………………………………………………………………………………..

### CELLPHONE NUMBER…………………………………………….

###

FACSIMILE NUMBER…………………………………

TEL NUMBER…………………………………………………………………………………

E-MAIL ADDRESS………………………………………………………………………………………………………..

VAT REGISTRATION NUMBER…………………………………………………………………………………………………………

HAS AN ORIGINAL AND VALID TAX CLEARANCE CERTIFICATE BEENATTACHED? (MBD 2) YES/NO

HAS A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE BEEN SUBMITTED? (MBD 6.1) YES/NO

IF YES, WHO WAS THE CERTIFICATE ISSUED BY?

AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA) □

A VERIFICATION AGENCY ACCREDITED BY THE SOUITH AFRICAN NATIONAL ACCREDITATION SYSTEM (SANAS) □

A REGISTERED AUDITOR □

(Tick applicable box)

(**A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE**)

IN SOUTH AFRICA FOR THE GOODS/SERVICES/WORKS OFFERED? YES/NO (IF YES ENCLOSE PROOF)

SIGNATURE OF BIDDER ……………………………………………………………………………………

DATE ……………………………………………………………………………………

CAPACITY UNDER WHICH THIS BID IS SIGNED ……………………………………………………………………………………

TOTAL BID PRICE……………………………………

 TOTAL NUMBER OF ITEMS OFFERED …………………………………

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**ANY ENQUIRIES REGARDING THE BIDDING PROCEDURE MAY BE DIRECTED TO:**

**Municipality / Municipal Entity:** **Umzimvubu Municipality** …………………………………………………………………….

**Department**: Budget and Treasury Office (Supply Chain Management)……………………………………………………………………………………………

…………………………………………………………………………………

**Contact Person: Contact person: Mr. T. Mbukushe**

**Tel: (039) 255 8500**

 **Fax: (039) 255 0167**

**Email:** **Mbukushe.Themba@umzimvubu.gov.za**

**ANY ENQUIRIES REGARDING TECHNICAL INFORMATION MAY BE DIRECTED TO:**

**Contact person: Mr. M. Matam**

**Tel: (039) 255 8500**

 **Fax: (039) 255 0167**

**Email: matam.mnoneleli@umzimvubu.gov.za**

**Tender Notice and Invitation to Tender**

**ADVERT DATE:**

**UMZ\2018\19LED\002**

Umzimvubu Local Municipality hereby invites credible service providers to bid for supply, deliver and distribute agricultural inputs to the respective wards of Umzimvubu Local Municipality. Interested service providers should declare their interest by submitting detailed and clear bill of quantities with delivery time frames. Please label the wards correctly and seperately.

**MANDATORY DOCUMENTS TO BE SUBMITTED, FAILURE TO DO SO WILL RESULT IN THE BID BEING DEMEED TO BE NON RESPONSIVE.**

Umzimvubu Local Municipality Supply Chain Management policy will apply. A confirmation from SARS with a verification pin, certified copy of company Registration/Founding Statement/CIPC Document. Certified BBBEE or sworn affidavits, exempt certificate and a combined BBBEE for a joint venture (non-elimination item). JV Agreement for Joint venture. 80/20 evaluation criteria. Prices quoted must be firm and must be inclusive of VAT for vat vendors. Certified ID Copies of Managing Directors/ Owners. Compulsory submission MBD forms 4, 8 and 9 and Billing Clearance certificate or Statement of Municipal Accounts. No couriered, faxed, e-mailed and late tenders will be accepted. Certification of documents must be within a period of 90 days. Bidders must be registered on CSD and provide confirmation of registration. Umzimvubu Local Municipality reserves the right not to appoint and value for money will be the key determinant of appointment. All tenders must be deposited in the tender box situated at Umzimvubu Local Municipality Offices at 813 Main STreet, Mt Frere not later than 12h00 noon on July 2018, where they will be opened in public. All tenders must be clearly marked **“ULM /LED/ 2018/19/002”**

**ALL-INCLUSIVE QUOTATIONS**,

For supply and delivery of inputs project will be done as per the below table. The ploughing inputs will be supplied and delivered in all the 27 wards of Umzimvubu Local Municipality. The PSC’s and Ward Councilors will monitor the use of the inputs for all the 27 maize fields of Umzimvubu: namely ward 1, 2, 3, 4, 5, 6, 8, 9, 10, 11, 12, 14, 15,16, 17, 18,19, 22, 23,24, 25, 26 and 27. The quotations for each ward should be summited separately.

Refer to the table 1 below:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **No** | **Ward** | **Hectares** | **Location** | **Land status** | **Weed type** |
| 1. | 1 | 5ha | Phepheni project  | 15ha land in use  | Green grass (kikuyu) and Rye grass and water grass |
| 10ha | Phepheni fields |
| 2. | 2 | 15ha | Lubaleko | 15ha Land in use  | Green grass (kikuyu) and Rye grass and water grass |
| 3 | 3 | 15ha | Gugwini | 15ha Land in use  | Green grass (kikuyu) and Rye grass and water grass |
| 4. | 4 | 15ha | Mnqwane | 15ha land in use | Green grass (kikuyu) and Rye grass and water grass |
| 5. | 5 | 10ha | Mapheleni | 10ha land in use | Green grass (kikuyu) and Rye grass and water grass |
| 6. | 6 | 15ha | Natal Gardens  | 15ha land in use  | Green grass (kikuyu) and Rye grass and water grass |
| 7. | 7 | 15ha | Skemane  | 15ha land in use  | Green grass (kikuyu) and Rye grass and water grass |
| 8. | 8 | 15ha | Ndakeni (7.5ha), | 15ha land in use | Green grass (kikuyu) and Rye grass and water grass |
|  | Lusuthu (7. 5ha) and  |
| 9. | 9 | 15ha | Goso (5ha) | 15ha land in use  | Green grass (kikuyu) and Rye grass and water grass |
|  | Sugarbush (5ha)  |
|  | Luxwesa (5ha) |
| 10. | 10 | 15ha | Mdakeni (15ha) | 15ha land in use  | Green grass (kikuyu) and Rye grass and water grass |
| 11 | 11 | 12ha | Sithinteni  | 12ha land in use  | Green grass (kikuyu) and Rye grass and water grass |
| 12 | 12 | 15ha | Tyeni  | 15ha land in use  | Green grass (kikuyu) and Rye grass and water grass |
| 13 | 13 | 7.5ha | Ntlabeni | 15ha land in use  | Green grass (kikuyu) and Rye grass and water grass |
| 7.5ha | Nyosini  |
| 14 | 14 | 7.5ha | Sahlulo | 15ha land in use  | Green grass (kikuyu) and Rye grass and water grass |
| 7.5ha | Sithane |
| 15 | 15 | 7.5ha | Mhlakwana  | 15ha Land in use | Green grass (kikuyu) and Rye grass and water grass |
| 7.5ha | Zwelitsha  |
| 16 | 16 | 5ha  | Lubhacweni | 5ha land in use |
| 17 | 17 | 3.75 ha | Mabhaceni  | 15ha Land in use  | Green grass (kikuyu) and Rye grass and water grass |
| 3.75 ha | Ngqantosi |
| 3.75 ha |  Sdikidiki  |
| 3.75 ha | Cwalinkungu |
|   |
| 18 | 19 | 5ha, crops | Mntwana | 15ha Land in use  | Green grass (kikuyu) and Rye grass and water grass |
| 19 | 20 | 5ha | Mpembha | 15ha Land in use  | Green grass (kikuyu) and Rye grass and water grass |
| 5ha | Lwandlana  |
| 5ha |  Ngxabaxa |
| 20 | 21 | 7.5ha | Zibokwana | 15ha Land in use  | Green grass (kikuyu) and Rye grass and water grass |
| 4.5ha |  Qoqa  |
| 21 | 22 | 15ha | Ngqwarha | 15ha Land in use  | Green grass (kikuyu) and Rye grass and water grass |
| 22 | 23 | 7.5ha | Mlenze  | 15ha Land in use  | Green grass (kikuyu) and Rye grass and water grass |
| 7.5ha | Qwidlana |
| 23 | 24 | 7.5ha | Lower Mnyana | 15ha Land in use  | Green grass (kikuyu) and Rye grass and water grass |
| 7.5ha | Sivumela |
| 24 | 25 | 15ha | Mthonjeni  | 15ha Land in use  | Green grass (kikuyu) and Rye grass and water grass |
| 25 | 26 | 7.5ha | Nyantungo  | 15ha Land in use  | Green grass (kikuyu) and Rye grass and water grass |
| 7.5ha |  Bhobhodla  |
| 26 | 27 | 5ha | Mbumbhathi | 15ha Land in use  | Green grass (kikuyu) and Rye grass and water grass |
| 5ha | Bhibha  |
| 5ha | Butsheni  |

**PRICING SCHEDULE**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **PRICING SCHEDULE** |  |  |  |  |
|  |  |  |  |
| **Item** | **Description** | **Ward** | **Quantity**  | **Unit price**  | **Total** |
| 1. |  Certified Yellow maize, open pollinated seed.Round –up ready plus seed that will be used for 15ha (Failure to supply will lead to non-payment).Seed must be 60-80k (plant per bag). |   |  |   |   |
| 2. | 2; 3; 4 (38) preferable 4 x 50kg bags per hectare. |  |  |  |  |
| 3. | LAN 3 x 50kg bags per hectare. |  |  |  |  |
|  4. | Pre - spray chemical. |  |  |   |   |
| 5. | Post - spray chemical  |  |  |  |  |
| 6. | Pesticides chemical that will treat 35 000 plants |  |  |  |  |
| 7. | VAT (15%) |  |  |  |  |
|  8. | TOTAL BID AMOUNT |   |  |   |   |

**Scope and Extent of work**

**1. The supply, deliver and distribution of agricultural inputs will be as follows: (REF ULM/11/2018/19/LED/02):**

The successful Service Provider shall be expected to render the following services cover amongst other things.

* Supply and deliver & distribute inputs to respective ward.
* Provide security in the storage of inputs until all used.
* Ensure that the inputs are supplied as per specification.

The below table illustrate the supply and deliver of inputs.

|  |  |
| --- | --- |
| **No** | **Items** |
| 1 | Certified Yellow maize, open pollinated seed.Round –up ready plus seed that will be used for 15ha (Failure to supply will lead to non-payment).Seed must be 60-80k (plant per bag). |
| 2 | 2; 3; 4 (38) preferable 4 x 50kg bags per hectare.  |
| 3 | LAN 3 x 50kg bags per hectare. |
| 4 | Pre - spray chemical. |
| 5 | Post - spray chemical  |
| 6 | Pesticides chemical that will treat 35 000 plants |

Please note that the planting population of 35,000 kernels per hectare is highly recommended.

PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT NO 5, 2011 (PPPFA) POINTS WILL BE

AWARDED AS FOLLOWS:-

Received Responsive proposals will be evaluated based on the following criteria:

The bid will be evaluated in one stage namely:

Stage: 1 Functionality and Methodology

|  |  |
| --- | --- |
| FUNCTIONALITY AND METHODOLOGY | POINTS |
| Previous experience on the supply of agricultural inputs ( not any supply of goods)  | 60 |
| A detailed delivery plan of inputs | 20 |
| Proof of the capacity to deliver goods and services as required.  | 20 |
| Total  | 100 |

Please note: Bidders who fail to meet 60 points minimum will not be considered for stage 2.

* Stage 2 – Price and Preferential Points

Price : 80

B-BBEE : 20

Total : 100

All Technical Enquiries are to be directed as follows:

Umzimvubu Local Municipality: Mr T. Mbukushe/ Mr M. Matam Tel: 039 255 8500 Fax: 039 255 0167**.**

Issued by office of the Municipal Manager: Mr. G.P.T. Nota, 813 Main Street, Mt Frere, 5090

Tel.: (039) 255 8500

Fax: (039) 255 1893 / 0167

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

G.P.T. Nota

Municipal Manager

**TOTAL POINTS FOR FUNCTIONALITY 100**

**NB: ONLY BIDDERS WHO OBTAINED 60 OUT OF THE 100 POINTS FOR FUNCTIONALITY WILL QUALIFY FOR EVALUATION IN TERMS OF PRICE (STAGE 2).**

The Preferential Procurement Policy Framework Act, Act 5 of 2017 will apply. The 80/20 system of adjudication will apply where 80 will be allocated for price and 20 will be for the preferential points. The details are tabled below.

**Enquiries:**

All technical enquiries may be directed to SCM: Mr T. Mbukushe 039 255 8517 and Mr T. Matola from LED. Other enquiries regarding this Bid may be directed to the office of the Municipal Manager: Mr GPT Nota.

**This bid closes on the …………………………………….**

**C1: AGREEMENTS AND CONTRACT DATA**

**C1.1 FORM OF OFFER AND ACCEPTANCE**

**A. OFFER**

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

**ANNUAL FINANCIAL STATEMENT REVIEW: UMZ/BTO/2016-17/05/18**

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

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

**The offered total of the prices inclusive of Value Added Tax is:**

Amount in Words.......................................................................................................................................

…………………………………………………………………………………………………………………….…

……………………………………………………………………………………………………………………….

**R**……………………………………………………..……………..…. (*in figures*)

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

**Signature:** *(of person authorised to sign the tender)*: ..............................................................................

**Name:** (*of signatory in capitals)*: ...............................................................................................................

**Capacity:** (*of Signatory*): ...........................................................................................................................

**Name of Tenderer:** (*organisation*): ..........................................................................................................

Address: ……...................................................................................................................................

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

Telephone number: ……………………………… Fax number: .......................................................

**Witness:**

**Signature:** .....................................................................................................

**Name:** *(in capitals):* ........................................................................................

**Date:** .............................................

***[Failure of a Tenderer to sign this form will invalidate the tender]***

**B. ACCEPTANCE**

By signing this part of the Form of Offer and Acceptance, the Employer identified below accepts the Tenderer’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 Tenderer’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.

The terms of the contract are contained in

Part 1 Agreements and Contract Data (which includes this Agreement)

Part 2 Pricing Data, including the Schedule of Quantities

Part 3 Scope of Work

Part 4 Site Information

and the schedules, forms, drawings and documents or parts thereof, which may be incorporated by reference into Parts 1 to 4 above.

Deviations from and amendments to the documents listed in the Tender Data and any addenda thereto listed in the Tender Schedules as well as any changes to the terms of the Offer agreed by the Tenderer 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 representatives of both parties.

The Tenderer shall deliver the Guarantee in terms of Clause 7 of the General Conditions of Contract 2010 within the period stated in the Contract Data, and he shall, immediately 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 other bonds, guarantees, proof of insurance and any other documentation to be provided in terms of the Conditions of Contract identified in the Contract Data, within 14 days of the date on which this Agreement comes into effect. 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 Tenderer receives one fully completed original copy of this document, including the Schedule of Deviations (if any). Unless the Tenderer (now Contractor) within five 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.

**Signature:**

**Name:** *(in capitals)*

**Capacity:**

**Name of Employer** *(organisation)*

 Address: ....................................... ...................................................................

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

**Witness: Signature:** ............................................... Name: ................................................................

**Date:** ............................................

**C. SCHEDULE OF DEVIATIONS**

The extent of deviations from the tender documents issued by the Employer prior to the tender closing date is limited to those permitted in terms of the Tender Data and the Conditions of Tender.

A Tenderer’s covering letter will not necessarily be included in the final contract document. Should any matter in such letter, which constitutes a deviation as aforesaid, become the subject of agreement reached during the process of offer and acceptance, the outcome of such agreement shall be recorded here.

Any other matter arising from the process of offer and acceptance either as a confirmation, clarification or change to the tender documents and which it is agreed by the Parties becomes an obligation of the contract shall also be recorded here.

Any change or addition to the tender documents arising from the above agreement 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:**

 **Details:**

**6. Subject:**

 **Details:**

By the duly authorised representatives signing this Schedule of Deviations, the Employer and the Tenderer agree to and accept the foregoing Schedule of Deviations as the only deviations from and amendments to the documents listed in the Tender Data and addenda thereto as listed in the Tender Schedules, as well as any confirmation, clarification or change to the terms of the offer agreed by the Tenderer 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 tender documents and the receipt by the Tenderer 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 TENDERER:**

**Signature:**

**Name:** ..........................

**Capacity:**

**Tenderer:** *(Name and address of organisation)* ......................................................

**Witness:**

**Signature:**

**Name:**

**Date**:

**FOR THE EMPLOYER**

**Signature:**

**Name:** ..........................

**Capacity:**

**Employer:** *(Name and address of organisation)* ......................................................

**Witness:**

**Signature:**

**Name:**

**Date:**

 **MBD 6.1**

**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, 2011.**

1. **GENERAL CONDITIONS**
	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. 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.
	2. Preference points for this bid shall be awarded for:
1. Price; and
2. B-BBEE Status Level of Contribution.

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

 **POINTS**

**1.3.1.1 PRICE** 80…………..

**1.3.1.2 B-BBEE STATUS LEVEL OF CONTRIBUTION** 20…………...

 **Total points for Price and B-BBEE must not exceed** **100**

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), a Registered Auditor approved by the Independent Regulatory Board of Auditors (IRBA), an Accounting Officer as contemplated in the Close Corporation Act (CCA) or a sworn Affidavit signed by a Commissioner of Oaths 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 OR 90/10 PREFERENCE POINT SYSTEMS**

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

 **80/20 or 90/10**

 **** or ****

 Where

 Ps = Points scored for comparative price of bid under consideration

 Pt = Comparative price of bid under consideration

 Pmin = Comparative price of lowest acceptable bid

1. **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** **(90/10 system)** | **Number of points** **(80/20 system)** |
| 1 | 10 | 20 |
| 2 | 9 | 18 |
| 3 | 6 | 14 |
| 4 | 5 | 12 |
| 5 | 4 | 8 |
| 6 | 3 | 6 |
| 7 | 2 | 4 |
| 8 | 1 | 2 |
| Non-compliant contributor | 0 | 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, a Verification Agency accredited by SANAS or a Sworn Affidavit from a Commissioner of Oaths.

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**

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, a Registered Auditor approved by IRBA, an Accounting Officer as contemplated in the CCA) or a Sworn Affidavit from a Commissioner of Oaths.**

**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 ……………………………………………………………………. :

9.4TYPE 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;

1. 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
2. forward the matter for criminal prosecution

**WITNESSES:**

1. ………………………………………

 ……………………………………

 SIGNATURE(S)OF BIDDER(S)

1. ………………………………………

DATE:……………………………….. ADDRESS:……………………

 ……………………………………….

 …………….…………………………

 **MBD 4**

**DECLARATION OF INTEREST**

1. No bid will be accepted from persons in the service of the state[[1]](#footnote-1)\*.

1. 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 positionin 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 and submitted with the bid.**

3.1 Full Name: …………………………………………………………………………

3.2 Identity Number: …………………………………………………………………

3.3 Company Registration Number: …………………………………………………

3.4 Tax Reference Number: …………………………………………………………

3.5 VAT Registration Number: ………………………………………………………

3.6 Are you presently in the service of the state**[[2]](#footnote-2)\*** **YES / NO**

 3.6.1 If so, furnish particulars.

 ………………………………………………………………

 ………………………………………………………………

3.7 Have you been in the service of the state for the past **YES / NO**

 twelve months?

* + 1. If so, furnish particulars.

………………………………………………………………

………………………………………………………………

3.8 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?

3.8.1 If so, furnish particulars.

 ………………………………………………………………

 ………………………………………………………………

3.9 Are you, aware of any relationship (family, friend, other) between a bidder and any persons in the service of the state who may be involved with the evaluation and or adjudication of this bid?

3.9.1 If so, furnish particulars

…………………………………………………………….

…………………………………………………………….

**YES / NO**

3.10 Are any of the company’s directors, managers, principle **YES / NO**

 shareholders or stakeholders in service of the state?

3.10.1 If so, furnish particulars.

 ………………………………………………………………

 ………………………………………………………………

* 1. Are any spouse, child or parent of the company’s directors, **YES / NO**

managers, principle shareholders or stakeholders in service

of the state?

3.11.1 If so, furnish particulars.

 ……………………………………………………………… **YES / NO**

**CERTIFICATION**

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

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

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

………………………………….. …………………………………..

 Signature Date

…………………………………. …………………………………………….

 Position Name of Bidder

SUBMISSION OF GOOD STANDING CERTIFICATES REGARDING TAX AND LEVIES

It is a condition of this tender that:

i) The taxes of the successful tender must be in order or a letter from the Receiver of Revenue that suitable arrangements have been made to bring the taxes in order. A current original Tax Clearance Certificate from the Receiver of Revenue must accompany the tender document. Failure to do so will result in the bid being disqualified.

ii) All municipal rates and taxes of the tenderer must be paid where the business has its head or regional office and a rates clearance certificate must be attached where the business has its head or regional office failure to do so will result in the bid being disqualified.

iv) If the submitted good standing certificates are found not to be correct, the ELM may, in addition to any other remedy it may have:

(a) recover from the contractor all costs, losses or damages incurred or sustained by the ELM as a result of the award of the contract; and/or

(b) cancel the contract and claim any damages which the ELM may suffer by having to make less favourable arrangements after such cancellation; and/or

(c) impose on the contractor a penalty not exceeding 5% of the value of the contract.

v) each party to a Consortium/Joint Venture/Sub-contract must submit separate tax and levies certificates.

vi) the tenderer shall submit with their tender current original certificates of the following:

1. the latest original tax certificate in respect of both the Income and Value Added Tax showing the date of issue and district of the Tenderer;
2. Municipal department of finances certificate of good standing or rates clearance certificate

**MBD 8**

# 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:
	1. abused the municipality’s / municipal entity’s supply chain management system or committed any improper conduct in relation to such system;
	2. been convicted for fraud or corruption during the past five years;
	3. willfully neglected, reneged on or failed to comply with any government, municipal or other public sector contract during the past five years; or
	4. 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 | 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 *audi alteram partem* rule was applied).The Database of Restricted Suppliers now resides on the National Treasury’s website([www.treasury.gov.za](http://www.treasury.gov.za)) and can be accessed by clicking on its link at the bottom of the home page.  | Yes[ ]  | No[ ]  |
| 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)? **The Register for Tender Defaulters can be accessed on the National Treasury’s website (**[**www.treasury.gov.za**](http://www.treasury.gov.za)**) by clicking on its link at the bottom of the home page.**  | Yes[ ]  | No[ ]  |
| 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[ ]  | No[ ]  |
| 4.3.1 | If so, furnish particulars: |
| **Item** | **Question** | **Yes** | **No** |
| 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[ ]  | No[ ]  |
| 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[ ]  | No[ ]  |
| 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 bids¹ invited.

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

3 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.

1. 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.
2. In order to give effect to the above, the attached Certificate of Bid Determination (MBD 9) must be completed and submitted with the bid:

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

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

**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:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Name of Municipality / Municipal Entity)

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

I certify, on behalf of:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_that:

(Name of Bidder)

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

(a) has been requested to submit a bid in response to this bid invitation;

(b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and

(c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder

**MBD 9**

1. 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 consortium³ will not be construed as collusive bidding.
2. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
3. prices;
4. 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.

1. 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.
2. The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

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

**MBD 9**

1. 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

# PAST EXPERIENCE

Bidders must furnish hereunder details of similar works/service of ploughing activities, which they have satisfactorily completed in the past. The information shall include an official order, goods received voucher which is system generated, and the traceable reference letters. description of the Works, the Contract value and name of Employer.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **EMPLOYER /INSTITUTION NAME** | **NATURE OF WORK/ PROJECT NAME** | **AWARDED AMOUNT** | **ANTICIPATED / ACTUAL COMPLETION DATE** | **EMPLOYER CONTACT NO.** |
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#  DATE SIGNATURE OF BIDDER

**PAST EXPERIENCE 2**

Bidders must furnish hereunder details of similar works/service, which they have satisfactorily completed in the past. The information shall include a description of the Works, the Contract value and name of Employer.

|  |
| --- |
| **CURRENT PROJECTS UNDERTAKEN FOR UMZIMVUBU MUNICIPALITY** |
| **PROJECT NAME** | **AWARDED AMOUNT** | **CONTRACT START DATE** | **ANTICIPATED / ACTUAL COMPLETION DATE** |
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| **TOTAL AMOUNT OF PROJECTS CURRENTLY UNDERTAKEN FOR UMZIMVUBU MUCIPALITY** | **R**  |

…………………………….. ......................................……..........

**DATE SIGNATURE OF BIDDER**

|  |
| --- |
| **RECENT PROJECTS UNDERTAKEN FOR UMZIMVUBU MUNICIPALITY** |
| **PROJECT NAME** | **AWARDED AMOUNT** | **CONTRACT START DATE** | **ANTICIPATED / ACTUAL COMPLETION DATE** |
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| **TOTAL AMOUNT OF PROJECTS RECENTLY UNDERTAKEN FOR UMZIMVUBU MUNICIPALITY** | **R**  |

…………………………….. ......................................……........

 **DATE SIGNATURE OF BIDDER**

# ANNEXURE B

# COMPANY DETAILS

The following company details schedule must be completed to ensure that the prerequisite requirements to bidding are met.

Registered Company Name:

Company Registration Number:

VAT Number:

Bank Name and Branch:

Bank Account Number:

# ANNEXURE C

# JOINT VENTURE DISCLOSURE FORM

**GENERAL**

i) All the information requested must be filled in the spaces provided. If additional space is required, additional sheets may be used and attached to the original documents.

ii) A copy of the joint venture agreement must be attached to this form, in order to demonstrate the Affirmable, Joint Venture Partner’s share in the ownership, control, management responsibilities, risks and profits of the joint venture, the proposed joint venture agreement must include specific details relating to:

a) the contributions of capital and equipment

b) work items to be performed by the Affirmable Joint Venture Partner’s own forces

c) work items to be performed under the supervision of the Affirmable Joint Venture Partner.

iii) Copies of all written agreements between partners concerning the contract must be attached to this form including those, which relate to ownership options and to restrictions/limits regarding ownership and control.

iv) ABE partners must complete ABE Declaration Affidavits.

v) The joint venture must be formalised. All pages of the joint venture agreement must be signed by all the parties concerned. A letter/ notice of intention to formalise a joint venture once the contract has been awarded will not be considered.

vi) Should any of the above not be complied with, the joint venture will be deemed null and void and will be considered non-responsive.

vii) A joint venture that is awarded a contract with Umzimvubu Municipality must be registered as a separate company with the Registrar of Businesses.

viii) The joint venture must be registered with South African Revenue Services.

ix) A separate bank account must be in place for the joint venture.

**1. JOINT VENTURE PARTICULARS**

a) Name

b) Postal address

c) Physical address

d) Telephone

e) Fax

**2. IDENTITY OF EACH NON-AFFIRMABLE JOINT VENTURE PARTNER**

**2.1(a)** Name of Firm

Postal Address

Physical Address

Telephone

Fax

Contact person for matters pertaining to Joint Venture Participation Goal requirements:

**2.2(a)** Name of Firm

Postal Address

Physical Address

Telephone

Fax

Contact person for matters pertaining to Joint Venture Participation Goal requirements:

*(Continue as required for further non-Affirmable Joint Venture Partners)*

**3. IDENTITY OF EACH AFFIRMABLE JOINT VENTURE PARTNER**

**3.1(a)** Name of Firm

Postal Address

Physical Address

Telephone

Fax

Contact person for matters pertaining to Joint Venture Participation Goal requirements:

**3.2(a)** Name of Firm

Postal Address

Physical Address

Telephone

Fax

Contact person for matters pertaining to Joint Venture Participation Goal requirements:

**3.3(a)** Name of Firm

Postal Address

Physical Address

Telephone

Fax

Contact person for matters pertaining to Joint Venture Participation Goal requirements:

**4. BRIEF DESCRIPTION OF THE ROLES OF THE AFFIRMABLE JOINT VENTURE PARTNERS IN THE JOINT VENTURE**

**5. OWNERSHIP OF THE JOINT VENTURE**

###### a) Affirmable Joint Venture Partner ownership percentage(s) ....................…%

b) Non-Affirmable Joint Venture Partner ownership percentage(s) .....................%

c) Affirmable Joint Venture Partner percentages in respect of : \*

**(i)** Profit and loss sharing ................................................….....…............

**(ii)** Initial capital contribution in Rands ..............……….....…..…................

 ............................................................................................….................

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

(\*Brief descriptions and further particulars should be provided to clarify percentages).

**(iii)** Anticipated on-going capital contributions in Rands .........……...........

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

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

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

 **(iv)** Contributions of equipment (specify types, quality, and quantities of equipment) to be provided by each partner.

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

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

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

**6. RECENT CONTRACTS EXECUTED BY PARTNERS IN THEIR OWN RIGHT AS PRIME CONTRACTORS OR AS PARTNERS IN OTHER JOINT VENTURES**

|  |  |  |
| --- | --- | --- |
|  | **NON-AFFIRMABLE JOINT VENTURE PARTNERS** | **PARTNER NAME** |
| a) |  |  |
| b) |  |  |
| c) |  |  |
| d) |  |  |
| e) |  |  |

|  |  |  |
| --- | --- | --- |
|  | **AFFIRMABLE JOINT VENTURE PARTNERS**  | **PARTNER NAME** |
| a) |  |  |
| b) |  |  |
| c) |  |  |
| d) |  |  |
| e) |  |  |

**7. CONTROL AND PARTICIPATION IN THE JOINT VENTURE**

(Identify by name and firm those individuals who are, or will be, responsible for, and have authority to engage in the relevant management functions and policy and decision making, indicating any limitations in their authority e.g. co-signature requirements and Rand limits).

 (a) Joint Venture cheque signing

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

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

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

(b) Authority to enter into contracts on behalf of the Joint Venture

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

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

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

(c) Signing, co-signing and/or collateralising of loans

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

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

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

(d) Acquisition of lines of credit

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(e) Acquisition of performance bonds

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

(f) Negotiating and signing labour agreements

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**8. MANAGEMENT OF CONTRACT PERFORMANCE**

(Fill in the name and firm of the responsible person).

 (a) Supervision of field operations

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

(b) Major purchasing

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

(c) Estimating

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

(d) Technical management

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

**9. MANAGEMENT AND CONTROL OF JOINT VENTURE**

(a) Identify the “managing partner”, if any,

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

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

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

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

(b) What authority does each partner have to commit or obligate the other to financial institutions, insurance companies, suppliers, subcontractors and/or other parties participating in the execution of the contemplated works?

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

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

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

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

(c) Describe the management structure for the Joint Venture’s work under the contract

|  |  |  |
| --- | --- | --- |
| **MANAGEMENT FUNCTION / DESIGNATION** | **NAME** | **PARTNER\*** |
|  |  |  |
|  |  |  |
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(Fill in “ex Affirmable Joint Venture Partner” or “ex non-Affirmable Joint Venture Partner”.

**10. PERSONNEL**

**(a)** State the approximate number of operative personnel (by trade/function/discipline) needed to perform the Joint Venture work under the Contract.

|  |  |  |
| --- | --- | --- |
| **TRADE/FUNCTION/****DISCIPLINE** | **NUMBER EX AFFIRMABLE JOINT VENTURE PARTNERS** | **NUMBER EX NON-AFFIRMABLE JOINT VENTURE PARTNERS** |
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(Fill in “ex Affirmable Joint Venture Partner” or “ex non-Affirmable Joint Venture Partner”).

(b) Number of operative personnel to be employed on the Contract who are currently in the employ of partners.

(i) Number currently employed by Affirmable Joint Venture Partners

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(ii) Number currently employed by the Joint Venture

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(c) Number of operative personnel who are not currently in the employ of the respective partner and will be engaged on the project by the Joint Venture

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(d) Name of individual(s) who will be responsible for hiring Joint Venture employees

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(e) Name of partner who will be responsible for the preparation of Joint Venture payrolls

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**11. CONTROL AND STRUCTURE OF THE JOINT VENTURE**

Briefly describe the manner in which the Joint Venture is structured and controlled.

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The undersigned warrants that he/she is duly authorised to sign this Joint Venture Disclosure Form and affirms that the foregoing statements are true and correct and include all material information necessary to identify and explain the terms and operations of the Joint Venture and the intended participation of each partner in the undertaking.

The undersigned further covenants and agrees to provide the Employer with complete and accurate information regarding actual Joint Venture work and the payment therefore, and any proposed changes in any provisions of the Joint Venture agreement, and to permit the audit and examination of the books, records and files of the Joint Venture, or those of each partner relevant to the Joint Venture, by duly authorised representatives of the Employer.

Signature

Duly authorised to sign on behalf of

Name

Address

Telephone

Date

Signature

Duly authorised to sign on behalf of

Name

Address

Telephone

Date

Signature

Duly authorised to sign on behalf of

Name

Address

Telephone

Date

Signature

Duly authorised to sign on behalf of

Name

Address

Telephone

Date

(Continue as necessary)

# ANNEXURE D

# COMPANY COMPOSITION

**GENERAL**

All information must be filled in spaces provided. If additional space is required, additional sheets may be attached. The onus is on the bidder to fill in all the information. Failure to do so will result in points being lost under equity. The full company composition is required including HDI and Non-HDI status. The ownership must accumulate to 100%.

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| --- | --- | --- | --- | --- | --- |
| NAME | IDENTITY NUMBER | CITIZENSHIP | DATE OF OWNERSHIP | % OWNED | VOTING % |
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1. [↑](#footnote-ref-1)
2. **\*** MSCM Regulations: “in the service of the state” means to be –

a member of –

any municipal council;

any provincial legislature; or

the national Assembly or the national Council of provinces;

a member of the board of directors of any municipal entity;

an official of any municipality or municipal entity;

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);

a member of the accounting authority of any national or provincial public entity; or

an employee of Parliament or a provincial legislature. [↑](#footnote-ref-2)