	REQUEST FOR QUOTATION	Form No: UW-RFQ-2 Version No: 1.1/2020 Effective Date: Jul 2020
	RFQ No: Q23/173/LD	

**You are hereby invited to submit a Quotation for the following requirements of
UMGENI WATER**

Advert Date:	24 October 2022		
RFQ Ref Number:	Q22/173/LD		
Description Of Goods/Services:	Supply And Installation Of Centralised Lubrication System In Mill falls Pump Station		
Closing/Due Date:	28 October 2022		Closing Time: 15h00
Compulsory Briefing / Clarification meeting:	Not applicable		
Documents Are Obtainable From:	Emailed		
SCM Procedure Enquiries may be directed to:	Buyer's Name & Surname: Londeka Dladla Tel No.: 033 341 1034 Email Address : Londeka.Dladla@umgeni.co.za		
Submissions:	Completed document TO By email to: scmquotes@umgeni.co.za NB: use <u>Quote Number Q23/173/LD</u> as email subject		
Technical Enquiries: (PM – Details)	Contact Person: Nikiwe.Hlabisa Email: Nikiwe.Hlabisa@umgeni.co.za Tel : 033 846 1800		
Contents			
1. Invitation Cover Page 2. Information about the Tenderer 3. Terms and conditions of Request for Quotation (RFQ) 4. RFQ Specification/s or Scope of Work/ Service Requirements 5. Price Page / Costing Schedule 6. Preferential Procurement Claim form – not applicable 7. Declaration of Interest 8. Contract Forms			

This RFQ is subject to the general conditions of the RFQ, National Treasury's general conditions of contract (GCC) and, if applicable, any other special conditions of contract (SCC).

Information about the Tenderer

RFQ Number	
Name of tenderer	
Registration number	
VAT registration number	
Telephone number	
Cell number	
E-mail address	
Postal address	
Physical address	
Umgeni Water Vendor No.	
CSD Supplier number	
CSD Unique Registration Reference Number	
Contact person's name	

I certify that the information furnished on this form is true and correct. I further accept that, in addition to cancellation of a contract, action may be taken against me should this declaration prove to be false.

Name of tenderer (duly authorised)

Signature of tenderer

Signature of tenderer

Date

TERMS AND CONDITIONS OF REQUEST FOR QUOTATION (RFQ)

1. Any alteration made by the tenderer must be initialled.
2. Use of correcting fluid is prohibited
3. This quotation is subject to the Preferential Procurement Policy Framework Act and the Preferential Procurement Regulations, 2019; the General Conditions of Contract (GCC) and if applicable any other Special Conditions of Contract.
4. Companies must be registered on the National Treasury's Central Suppliers Database.
5. Suppliers are advised that the 80/20 preference points system shall be applied in the evaluation of this quotation. To qualify for preference points suppliers are required to submit certified copies of valid B-BBEE status Level Verification Certificates to substantiate their B-BBEE rating claims. Refer to SBD 6.1 form.
6. Suppliers must complete the attached **SBD 4** -Declaration of interest form, the **SBD 8** - Declaration of Suppliers past performance form and the **SBD 9** - Certificate of Independent Bid Determination. Failure to complete these documents may result in the quotation being invalidated.
7. Quotations must be in accordance and comply with the specifications/scope of work provided, unless otherwise stipulated.
8. The official Umgeni Water quotation form must be used to tender the offered price. Should the allocated price page be insufficient, the tenderer may supplement the price page with an additional pricing breakdown.
9. The successful supplier may be required to fill in and sign a written Contract Form. (If applicable)
10. This document may contain confidential information that is the property of Umgeni Water.
11. No part of the contents may be used, copied, disclosed or conveyed in whole or in part to any party in any manner whatsoever other than for preparing a proposal in response to this RFQ, without prior written permission from Umgeni Water and the Tenderer.
12. All Copyright and Intellectual Property herein vests with Umgeni Water and its Tenderer.
13. Quotations must be submitted by email scmquotes@umgeni.co.za or be deposited in tender box situated as indicated on the quotation request form marked appropriated as directed. (*The applicable submission method is reflected on the cover page*). Suppliers should ensure that quotations are delivered before closing time and to the correct address.
14. It is the responsibility of the bidder to ensure that its response reaches Umgeni Water on or before the closing date and time of the RFQ.
15. Late and incomplete submissions will not be accepted.
16. Price Declaration must be completed, and should the total RFQ prices differ, the one indicated on the price declaration shall be considered the correct price.
17. Tenderers are required to submit a valid Tax clearance verification PIN.
18. No services must be rendered or goods delivered before an official Umgeni Water Purchase Order form has been received.

The Tenderer accepts the above terms, conditions, and Umgeni Water's Standard Conditions of Tender*.	Accept	Do not accept

*A full copy of UW's Standard Conditions of Tender are available on Umgeni Water's website.

http://www.umgeni.co.za/pdf/cm009_standard_conditions_of_tender.pdf

CONDITIONS OF QUOTE

1. I/We hereby quote to supply all or any of the supplies and/or to render all or any of the services described in the attached documents to Umgeni Water on the terms and conditions. In accordance with the specifications stipulated in the quotation documents (and which shall be taken as part of and be incorporated into this quote) at the prices and on the terms regarding time for delivery and/or execution inserted therein.
2. I/we agree that:
 - (a) the offer herein shall remain binding upon me and open for acceptance by Umgeni Water during the validity period indicated and calculated from the closing time of the quote;
 - (b) this quote and its acceptance shall be subject to the Public Finance Management Act, 1999, Umgeni Water's Supply Chain Management Policy and Procedures, the General and Special Conditions of Contract as may be applicable, with which I/we am fully acquainted;
 - (c) if I/we withdraw my quote within the period for which I/we have agreed that the quote shall remain open for acceptance, or fail to fulfil the contract when called upon to do so. Umgeni Water may, without prejudice to its other rights, agree to the withdrawal of my quote or cancel the contract that may have been entered into between Umgeni Water and I/us. I/we will then pay to Umgeni Water any additional expenses incurred for having either to accept any less favourable quote or, if fresh quote have to be invited, the additional expenditure incurred by the invitation of fresh quotes and by the subsequent acceptance of any less favourable quotes. Umgeni Water shall reserve the right to recover such additional expenditure by set-off against monies which may be due to me under this, or any other tender or contract or against any guarantee or deposit that may have been furnished by me or on my behalf for the due fulfilment of this or any other tender or contract. Pending the ascertainment of the amount of such additional expenditure to retain such monies, guarantee or deposit as security for any loss Umgeni Water may sustain by reason of my default;
 - (d) if my quote is accepted, the acceptance may be communicated to me by electronic mail, to the email address supplied in my quotation document;
 - (e) the law of the Republic of South Africa shall govern the contract created by the acceptance of my quote and I choose *domicilium citandi et executandi* in the Republic at (full physical address) :
.....
.....
3. I/we furthermore confirm that I/we have satisfied myself as to the correctness and validity of my quote: that the price(s), rate(s) and preference quoted cover all of the work/item(s) and my obligations under a resulting contract, and I accept that any mistakes regarding the price(s) and calculations will be at my risk.
4. I/we hereby accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this agreement, as the Principal(s) liable for the due fulfilment of this contract.
5. I/we agree that any action arising from this contract may in all respects be instituted against me and I/we hereby undertake to satisfy fully any sentence or judgement which may be pronounced against me as a result of such action.
6. I/we confirm that I/we have declared all and any interest that I or any persons related to my business has with regard to this quote or any related quotations by completion of the Declaration of Interest Section.

7. CERTIFICATION OF CORRECTNESS OF INFORMATION SUPPLIED IN THIS DOCUMENT

I/WE, THE UNDERSIGNED, WHO WARRANT THAT I AM DULY AUTHORISED TO DO SO ON BEHALF OF THE TENDERER, CERTIFY THAT THE INFORMATION SUPPLIED IN TERMS OF THIS DOCUMENT IS CORRECT AND TRUE, THAT THE SIGNATORY TO THIS DOCUMENT IS DULY AUTHORISED AND ACKNOWLEDGE THAT:

- (1) The tenderer will furnish documentary proof regarding any tendering issue to the satisfaction of the Umgeni Water, if requested to do so.
- (2) If the information supplied is found to be incorrect and/or false then Umgeni Water, in addition to any remedies it may have, may: -
 - a) Recover from the contractor all costs, losses or damages incurred or sustained by Umgeni Water as a result of the award of the contract, and/or
 - b) Cancel the contract and claim any damages which Umgeni Water may suffer by having to make less favourable arrangements after such cancellation.

SIGNED ON THIS _____ DAY OF _____ 20 _____ AT _____

**SIGNATURE OF TENDERER OR DULY
AUTHORISED REPRESENTATIVE**

FULL NAME (IN BLOCK LETTERS)

ON BEHALF OF (TENDERER'S NAME) _____

CAPACITY OF SIGNATORY _____

NAME OF CONTACT PERSON (IN BLOCK LETTERS) _____

POSTAL ADDRESS _____

POSTAL CODE _____

TELEPHONE NUMBER: _____

FAX NUMBER: _____

CELLULAR PHONE NUMBER: _____

E-MAIL ADDRESS: _____

SCOPE OF WORK/SPECIFICATIONS/ REQUIREMENTS:

BACKGROUND and SCOPE OF WORK:

Umgeni Water(UW) requires a contractor to supply and install a centralised automatic lubrication system in Millfalls pump station. Millfalls pump station is located at Midmar Sludge plant, downstream of Midmar waterworks (WW) next to Howick town. The pump station consists of two pumping systems, namely: Millfalls to Howick-West and Millfalls to Howick-North pumping systems. Each pump station consists of three centrifugal pumps and the details are shown in Table 1 below.

Table 1: Millfalls Pumping Systems

Details	Millfalls to Howick-West	Millfalls to Howick-North
Pump	RDL 300-620 A	
Motor	Siemens cage induction motor	WEG W22 Premium Plus
Power	550 kW	132 kW
Quantity	3	3
Speed	1481 rpm	1490 rpm

The centralised automatic lubrication system is required for lubricating grease lubricated bearings on 6 electrical motors only for both pumping systems at Millfalls pump station.

TECHNICAL SPECIFICATION

The minimum specification for the required centralised automatic lubrication system is as follows:

- The lubrication system must be total loss system type and must be able to supply multiple lubrication points with variable grease quantities.
- Lubricant must be pumped by an electrically powered positive displacement pump from a centralised grease reservoir.
- The grease reservoir must be equipped with a low level sensor and must be able to be monitored remotely from Midmar control room.
- The automatic lubrication system must be equipped with monitoring equipment such that, when the motor is not running, the lubrication must also stop.
- The system must be controlled via PLC, and must be able to indicate when there is a blockage in the system. Umgeni water uses Allen Bradley PLC, the control system of the centralised automatic lubrication system must be integrated with the existing PLC system.
- The centralised lubrication system must have but not limited to following components:
 - pumping unit
 - grease reservoir
 - volumetric distributors
 - piping and fittings
 - pressure sensors and pressure relief valves
 - solenoid valves
 - control unit
- The capacity of each lubrication point must be as per the capacities in Table 2.

- The contractors are required to visit Millfals pump station to take their own measurement and to identify a position to mount the pump and the grease reservoir for the required centralised automatic lubrication system.
- The specifications of the electrical moto bearings is shown in Table 2 below (as found on name plate).

Table 2: Bearing Specifications for Electrical Motors

Specification	Millfalls to Howick-West	Millfalls to Howick-North
DE bearing name	Cylinder roller bearing & Deep Grove Ball Bearing	Cylinder roller bearing
DE bearing number	NU222+6222 C3	NU 319 C3
NDE bearing name	Cylinder roller bearing	Deep Grove Ball Bearing
NDE bearing number	NU222	6316 C3
OEM recommended grease	BP LS2	Mobil Polyrex EM
Lubrication fitting sizes	3/8"	3/8"
Capacity	80g /8000 hrs	45g /7000 hrs

The required centralised automatic lubrication system must meet the following specification as shown in **Table 3** below as a minimum specification:

Table 3: Specification for the Required Automated Lubrication System

Specification	Value
Grease reservoir capacity	2 to 4 litres
Maximum operating pressure	350 bar
Grease NLGI grade	2
Grease type	Mobil Polyrex EM or equivalent approved by Umgeni Water
Temperature range	-20 °C to 110 °C

- The contractor will be required to design the suitable centralised automatic lubrication system and present the design to Umgeni Water Maintenance Engineer for approval.
- During commissioning, the contractor is required to train Umgeni Water Artisans, Technicians and Engineers on how to maintain and operate the automated centralised lubrication system.
- Equipment data sheet must be submitted to UW for approval before equipment can be supplied
- The installation will be done on the live system, all health and safety precautions must be adhered to, including proper PPE.
- The grease supply pipes must be installed and trunked on the ground and must no interfere with the movement of the overheard crane.
- Contractors will be required to attend a compulsory site meeting on time and date that be advised by the buyer
- System should self-diagnose if the is any problems within the system.

FUNCTIONALITY

The contractors will be evaluated on experience of the contractor and experience of the key personnel. Table 4 shows percentage weighting of the evaluation criteria. The minimum qualifying functionality evaluation score shall be 70 points.

Table 4: Percentage Weighting of Scoring Criteria

Returnable schedule	Weighting %
Experience of the contractor	40
Experience and qualifications of the key personnel	60

○ **Experience of the contractor (40)**

Contractors are required to have experience in design/ installation/ PLC programing and SCADA configuration/ maintenance of automated centralised lubrication system. Contractors are required to very briefly describe the experience of the contractor in this regard relevant to the scope of work and fill in the experience of the contractor in Table 5 overleaf.

Table 5: Contractor's Experience

Description of work (service)	Period / Year	Value of work (i.e. the service provided) inclusive of VAT (Rand)	Company (Where the Service was provided)	Contact details

Table 6 shows scoring of contractor's experience.

Table 6: Scoring of Contractor's Experience

Description	Maximum possible score
<p>Contractors are required to have at least three (3) project of a similar nature to qualify.</p> <p>Company experience in services comprising: design/ installation/ PLC programing and SCADA configuration/ maintenance of automated centralised lubrication system. Completion certificates or confirmation letters from the client for such projects must be attached with the quotation.</p> <ul style="list-style-type: none"> • 1 project – 40 points • 2 projects – 60 points • 3 projects – 80 points <p>10 additional points for every projects more than 3 projects to a maximum of 100 points.</p>	100

○ **Key personnel (60)**

The following key personnel are required for this service:

- Engineer (Mechanical/ Electrical/ Instrumentation)
- Technician Mechanical
- Technician Electrical /Instrumentation

The contractor is required to fill in the names of the key personnel in **Table 7** below. The contractors are required to submit CV's that are not more than three pages and qualification certificates as proof of qualifications.

Table 7: Key Personnel

No.	Proposed Function	Key Person Name
1.	Engineer (Mechanical/ Electrical/ Instrumentation)	
2.	Technician Mechanical	
3.	Technician Electrical /Instrumentation	

Each discipline is expected to have the qualifications stated below to qualify to do this installation.

Engineer (Mechanical/ Electrical/ Instrumentation) (40 points)

The qualifications and experience of the Engineer are shown in

Table 8 below

Table 8: Qualifications and Experience of the Engineer

Description	Maximum possible score
<p>The Engineer must have BSc/ BEng/ BTech/ National Dip/ National N Dip in Mechanical/ Instrumentation/ Electrical Engineering.</p> <ul style="list-style-type: none">• 10 points for qualification <p>The Engineer must have a minimum of three years' experience in design/ PLC programming and SCADA configuration/ maintenance/ installation of automated centralised lubrication system. CV and certificates must be attached.</p> <ul style="list-style-type: none">• 1 project – 10 points• 2 projects – 15 points• 3 projects – 20 points <p>5 additional points for every projects more than 3 projects to a maximum of 30 points.</p>	100

Technician Mechanical (30 points)

Qualifications and experience of Mechanical Technician are shown in Table 9 below

Table 9: Qualifications and Experience of Mechanical Technician

Description	Maximum possible score
<p>The Mechanical Technician must have national diploma/ national N diploma/ N6 and trade test in Mechanical Engineering.</p> <ul style="list-style-type: none">• 10 points for qualification <p>The Technician must have a minimum of three years' experience in design/ maintenance/ installation of automated centralised lubrication system. CV and certificates must be attached.</p> <ul style="list-style-type: none">• 1 project – 5 points• 2 projects – 10 points• 3 projects – 15 points <p>5 additional points for every projects more than 3 projects to a maximum of 20 points.</p>	100

Technician Electrical /Instrumentation (30 points)

Qualifications and experience of Electrical/ Instrumentation Technician are shown in Table 10 below

Table 10: Qualifications and Experience of Electrical/ Instrumentation Technician

Description	Maximum possible score
<p>The Electrical/ Instrumentation Technician must have national diploma/ national N diploma in Electrical or Instrumentation.</p> <ul style="list-style-type: none"> • 10 points for qualification <p>The Technician must have a minimum of three years' experience in design/ PLC programming and SCADA configuration/ maintenance of electrical or instrumentation equipment. CV and certificates must be attached.</p> <ul style="list-style-type: none"> • 1 project – 5 points • 2 projects – 10 points • 3 projects – 15 points <p>5 additional points for every projects more than 3 projects to a maximum of 20 points.</p>	100

SHEQ

○ Security

- The Contractor shall ensure that all tools and materials are kept under lock and key.
- Umgeni Water is not responsible for the loss of the Contractor's equipment as a result of any cause whatsoever.
- Umgeni Water reserves the right for security guards to search persons or vehicles entering or leaving the premises.
- The contractor must ensure that COVID-19 protocols are adhered to at all times during the execution of this work

○ Permits

- The Contractor shall not perform work for which the issuing of a permit is required prior to the obtaining of a duly completed and approved work permit. The following are included as hazardous tasks and may not be carried out by the Contractor unless a work permit has been duly authorized by Umgeni Water:
 - Cutting or welding in any risk area.
 - Working at a height of more than two meters.
 - Working with hazardous substances (e.g. toxic chemicals and flammable liquids).
 - Working inside confined spaces (e.g. vessels, chambers and pipelines).
 - Working in electrical lockouts installations.
 - Breaking in any live water main

○ Housekeeping

- After the completion of each day work the Contractor must make good and clean up the site area where work was performed, and also at the completion of the contract.
- Sites must be kept reasonable tidy during work operations.

○ Alcohol or intoxicating Substances

- The Contractor shall ensure that NO alcohol or intoxicating substances are on their possession while on site. Anyone suspected to be intoxicated or under influence of Alcohol shall not be allowed on site.

○ Safety

- Umgeni Water has a strict attitude when it comes to personal safety of ALL on site.

The Contractor is expected to provide a Health and Safety File to meet the minimum requirements of the Construction Regulations 2014.

- The Health & Safety file must be submitted to the SHEQ co-ordinator prior to any work execution. The Contractor and sub-contractors have to attend a Compulsory Induction before starting the project.
- Unsafe activities, equipment / device(s) and procedures shall not be tolerated. It should be noted that if this work requires people to work in elevated positions and confined areas, compliance to the OHS Act is mandatory. The Contractor will be required to submit together with the quotation a schedule of all his activities and as to how he intends to carry them, to the Umgeni Water Project Manager and Safety Officer for approval.

○ **Safety file index**

The safety file must contain but not limited to the following:

- Organogram (Site Structure)
- Section 37 (signed by Umgeni Water representative as well as the contractor) (To be provided by Umgeni Water)
- Rules for contractors on site (signed by contractor supervisor) (To be provided by Umgeni Water)
- Appointments (As well as proof of training)
- Medical fitness test certificated with copies of IDs
- Letter of good standing with Labour Department
- COID
- Company safety Policy
- Method Statements
- Risk assessments
- Safe working Procedures / SHE Plan (to include confined space as well as a fall protection plan if work is to be done at heights exceeding 1.5M)
- Equipment certification (as per legislative requirements depending on the equipment to be used during the project as well as proof of training to operate equipment as may be required by legislation also depending on equipment / machinery used during the project)
- Registers (PPE, Equipment Checklist, First aid box etc)
- Emergency Numbers
- Environmental Management Plan (covering bad weather conditions as well)

○ **Safety induction**

- The qualifying contractor to make sure that all staff who will be working on this Project must be Safety Inducted before the commencement of any work. This will include all sub- contractors' staff.

○ **Safety Clothing and Equipment**

- The Contractor shall supply all the Umgeni Water specified safety clothing and equipment for his workmen on site. The Contractor's workmen on site shall wear hard hats, safety glasses, safety shoes and overalls.

GENERAL

THE FOLLOWING UMGENI WATER SPECIFICATIONS AND PROCEDURES WILL BE ADHERED TO WHEN EXECUTING THE ABOVE WORK:

- The Contractor shall maintain an effective quality management system in accordance with the requirements of ISO 9001:1987 or equivalent, so as to ensure and demonstrate that goods and services conform to the specified requirements.
- Any aspects of this scope of work not clearly understood shall be referred to the Umgeni Water Project Manager in writing for clarification.
- All work will be performed in accordance with the Occupational Health and Safety Act and Regulations (Act 85 of 1993).
- The Contractor shall pay special attention to and abide by Umgeni Water's Guidelines To Contractors.
- Umgeni Water "Standard Conditions of Purchase" shall apply

DOCUMENTATION TO BE DELIVERED WITH ITEMS

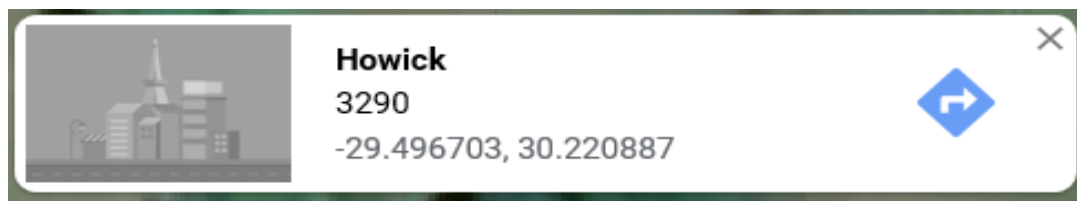
- Installation manual
- Operation manuals
- Assembly drawings
- Item Bill of material
- Control philosophy
- P&ID

WARRANTIES

The Contractor shall guarantee his equipment and services against defective materials and workmanship for a period of at least one year unless the Contractor offers a better guarantee. Equipment warranties to be in line with OEM warranties

SITE DETAILS

The centralised automatic lubrication system will be installed at Millfalls pump station. The GPS coordinates for Millfalls pump station are shown in **Error! Reference source not found.** below:



2. INSTRUCTION TO TENDERERS

	Mandatory Requirement	Comply (Yes/No)	Remarks
1	CSD Summary report		
2	Certified copy of a B-BBEE Certificate and/or Affidavit		
3	Tax Clearance Certificate and/or TAX Verification PIN		
4	Certificate of Incorporation (CIPC Registration Certificate listing company directors/shareholders/owner/s)		

2.1 ELIGIBILITY AND EVALUATION CRITERIA
1. ELIGIBILITY

Umgeni Water will only consider submissions from tenderers who satisfy the following criteria:

- a) the Tenderer has completed and signed the Declaration of Interest and there are no conflicts of interest which may impact on the Tenderer's ability to perform the contract in the best interests of the Purchaser or potentially compromise the tender process and persons in the employ of the state are permitted to submit tenders or participate in the contract;

2. EVALUATION METHOD:

a) evaluated on: Price & Preference using the 80/20 Preference Point Scoring System in terms of PPPFA.

b) Evaluated on Functionality: The contractors will be evaluated on experience of the contractor and experience of the key personnel. The minimum qualifying functionality evaluation score shall be 70 points

TENDERER'S NAME AND ADDRESS				DETAILS OF PURCHASING OFFICE		
COMPANY NAME:				UMGENI WATER (HEAD OFFICE) Supply Chain Management Unit 310 Burger Street Pietermaritzburg, 3201 Enquiries: Tel no.: Email:		
ADDRESS:						
COMPANY REG. NUMBER:						
CONTACT NO.						
CONTACT PERSON						
REFERENCE (REQ NO.)		CLOSING DATE & TIME		VALIDITY PERIOD:		
Q23/173/LD		28 October 2022				
ITEM No	DESCRIPTION	UNIT	QTY	RATE	AMOUNT	
1	PART 1- PRELIMINARY AND GENERAL					
1.1	Compile and Submission of SHEQ Safety File	sum	1	R	R	
1.2	Submission of Equipment Manuals	sum	1	R	R	
1.3	As built drawings	sum	1	R	R	
1.9	Commissioning for 2 days	days	2	R	R	
PART 1 CARRIED FORWARD TO SUMMARY PAGE						R
2	PART 2- SUPPLY AND INSTALLATION OF CENTRALISED AUTOMATIC LUBRICATION SYSTEM					
2.1	Design of centralised automatic lubrication system	Sum	1	R	R	
2.2	Presentation of the design to Umgeni Water personnel	Sum	1	R	R	
2.3	Supply and installation of the centralised automatic lubrication system, including all necessary accessories as per the design					
2.3.1	Material					
2.3.1.1	Mechanical (pipes, fittings, pump, reservoir, etc)	Sum	1	R	R	
2.3.1.2	Electrical (cables, etc)	Sum	1	R	R	
2.3.1.3	Instrumentation (cables, cards, etc)	Sum	1	R	R	
2.3.2	Labour	Sum	1	R	R	
PART 2 CARRIED FORWARD TO SUMMARY PAGE						R
A - Total for all Items excluding VAT (PART 1 + PART 2)						R
B – Contingences @ 10% of A						R
C Subtotal (A + B)						R
D - VAT @ 15% of C						R
E Total including VAT (C+D)						R

3.1 Price Declaration

Please indicate your total RFQ price in words below **(compulsory)**:

NB: It is mandatory to indicate your total RFQ price as requested above. This price must be the same as the total RFQ price you submit in your pricing schedule. Should the total RFQ prices differ, the one indicated above shall be considered the correct price.

The following must be noted:

- All prices must be VAT inclusive and must be quoted in South African Rand (ZAR).
- All prices must be firm and fixed from the quotation closing date and for the duration of the contract
- All prices must have supplied according to the costing template provided, pricing breakdown schedules may be supplied as annexures to the quoted if deemed necessary.
- The cost of delivery, labour etc. must be included in the total quoted price.

1.

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

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

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

2. Bidder's declaration

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

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

Full Name	Identity Number	Name of institution	State

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

2.2.1 If so, furnish particulars:

.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract?

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

YES/NO

2.3.1 If so, furnish particulars:

.....
.....

3 DECLARATION

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

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

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

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

² Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2019

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, 2019.

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 exceed/not exceed R50 000 000 (all applicable taxes included) and therefore the 80/20 preference point system shall be applicable; or

1.3 Points for this bid shall be awarded for:

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

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

	POINTS
PRICE	80
B-BBEE STATUS LEVEL OF CONTRIBUTOR	20
Total points for Price and B-BBEE must not exceed	100

1.5 Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.

1.6 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

- (a) **"B-BBEE"** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- (b) **"B-BBEE status level of contributor"** means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- (c) **"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 goods or services, through price quotations, advertised competitive bidding processes or proposals;
- (d) **"Broad-Based Black Economic Empowerment Act"** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- (e) **"EME"** means an Exempted Micro Enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (f) **"functionality"** means the ability of a tenderer to provide goods or services in accordance with specifications as set out in the tender documents.
- (g) **"prices"** includes all applicable taxes less all unconditional discounts;
- (h) **"proof of B-BBEE status level of contributor"** means:

- 1) B-BBEE Status level certificate issued by an authorized body or person;
 - 2) A sworn affidavit as prescribed by the B-BBEE Codes of Good Practice;
 - 3) Any other requirement prescribed in terms of the B-BBEE Act;
- (i) “**QSE**” means a qualifying small business enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (j) “**rand value**” means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

3. POINTS AWARDED FOR PRICE

3.1 THE 80/20 PREFERENCE POINT SYSTEM WILL BE APPLIED FOR THIS TRANSACTION

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 price of bid under consideration

P_t = Price of bid under consideration

P_{min} = Price of lowest acceptable bid

4. POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR

- 4.1 In terms of Regulation 6 (2) and 7 (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. BID DECLARATION

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

6. B-BBEE STATUS LEVEL OF CONTRIBUTOR CLAIMED IN TERMS OF PARAGRAPHS 1.4 AND 4.1

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

(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 4.1 and must be substantiated by relevant proof of B-BBEE status level of contributor.

7. SUB-CONTRACTING7.1 Will any portion of the contract be sub-contracted? (*Tick applicable box*)

YES		NO	
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7.1.1 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 or QSE (*Tick applicable box*)

YES		NO	
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- v) Specify, by ticking the appropriate box, if subcontracting with an enterprise in terms of Preferential Procurement Regulations, 2019:

Designated Group: An EME or QSE which is at least 51% owned by:	EME <input checked="" type="checkbox"/>	QSE <input checked="" type="checkbox"/>
Black people		
Black people who are youth		
Black people who are women		
Black people with disabilities		
Black people living in rural or underdeveloped areas or townships		
Cooperative owned by black people		
Black people who are military veterans		
OR		
Any EME		
Any QSE		

8. DECLARATION WITH REGARD TO COMPANY/FIRM

8.1 Name of company/firm:.....

8.2 VAT registration number:.....

8.3 Company registration number:.....

9. TYPE OF COMPANY/ FIRM [Tick applicable box]

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

9.1 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

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.....

9.2 COMPANY CLASSIFICATION [TICK APPLICABLE BOX]

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

9.3 Total number of years the company/firm has been in business:_____

9.4 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 contributor indicated in paragraphs 1.4 and 6.1 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 paragraphs 1.4 and 6.1, 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 contributor 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) recommend that the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury 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.

<p>WITNESSES (Full Name & Signature)</p> <p>1. _____</p> <p>Signature: _____</p> <p>2. _____</p> <p>Signature: _____</p> <p style="text-align: center;">_____</p> <p style="text-align: center;">Date</p>	<p>Signatory:</p> <p>_____</p> <p>Tenderer's Signature: _____</p> <p>Address: _____</p> <p>_____</p> <p>_____</p> <p style="text-align: center;">_____</p> <p style="text-align: center;">Date</p>
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RFQ Number: Q23/173/LD SUPPLY AND INSTALL LUBRICATION SYSTEM

CERTIFICATE OF ACQUAINTANCE WITH RFQ, TERMS & CONDITIONS & APPLICABLE DOCUMENTS

By signing this certificate, the **Respondent** is deemed to acknowledge that he/she has made himself/herself thoroughly familiar with, and agrees with all the conditions governing this **RFQ**. This includes those terms and conditions contained in any printed form stated to form part hereof, including but not limited to the documents stated below. As such, **Umgeni Water** will recognise no claim for relief based on an allegation that the **Respondent** overlooked any such condition or failed properly to take it into account for the purpose of calculating tendered prices or any other purpose:

- | |
|---|
| 1 Umgeni Water's Standard Conditions of Tender* |
| 2 Umgeni Water's Terms and Conditions of Contract for the supply of Good/Services to Umgeni Water's |

Should the Tenderer find any terms or conditions stipulated in any of the relevant documents quoted in the RFQ unacceptable, it should indicate which conditions are unacceptable.

The Tenderer accepts that an obligation rests on them to obtain clarity relating to any uncertainties regarding any quote, which they intend to respond on, before submitting an offer. The Tenderer agrees that he/she will have no claim based on an allegation that any aspect of this RFQ was unclear but in respect of which he/she failed to obtain clarity.

SIGNED at _____ on this _____ day of _____ 20_____

SIGNATURE OF WITNESSES

ADDRESS OF WITNESSES

1 _____

Name _____

2 _____

Name _____

SIGNATURE OF TENDERER'S AUTHORISED REPRESENTATIVE:

NAME: _____ DESIGNATION: _____

*A full copy of UW's Standard Conditions of Tender are available on Umgeni Water's website.

http://www.umgeni.co.za/pdf/cm009_standard_conditions_of_tender.pdf

CONTRACT FORM - RENDERING OF SERVICES

THIS FORM MUST BE FILLED IN DUPLICATE BY BOTH THE SERVICE PROVIDER (PART 1) AND THE PURCHASER (PART 2). BOTH FORMS MUST BE SIGNED IN THE ORIGINAL SO THAT THE SERVICE PROVIDER AND THE PURCHASER WOULD BE IN POSSESSION OF ORIGINALLY SIGNED CONTRACTS FOR THEIR RESPECTIVE RECORDS.

PART 1 (TO BE FILLED IN BY THE SERVICE PROVIDER)

1. I hereby undertake to render services described in the attached quotation documents to **Umgeni Water** in accordance with the requirements and task directives / proposals / specifications stipulated in Quote Number Q22/173/LD at the price/s quoted. The offer/s remain binding upon me and open for acceptance by the Purchaser during the validity period indicated and calculated from the closing date of the Quote .
2. The following documents shall be deemed to form and be read and construed as part of this agreement:
 - (i) Tendering documents, viz
 - Invitation to quote;
 - Tax clearance certificate;
 - Pricing schedule(s);
 - Filled in task directive/proposal;
 - Preference claims for Broad Based Black Economic Empowerment Status Level of Contribution in terms of the Preferential Procurement Regulations 2017;
 - Declaration of interest;
 - Declaration of bidder's past SCM practices;
 - Certificate of Independent Bid Determination;
 - Umgeni Water's Standard Conditions of Tender;
 - (ii) General Conditions of Contract; and
 - (iii) Other (specify)
3. I confirm that I have satisfied myself as to the correctness and validity of my bid; that the price(s) and rate(s) quoted cover all the services specified in the quotation documents; that the price(s) and rate(s) cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.
4. I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this agreement as the principal liable for the due fulfillment of this contract.
5. I declare that I have no participation in any collusive practices with any bidder or any other person regarding this or any other quote.
6. I confirm that I am duly authorised to sign this contract.

NAME (PRINT)

CAPACITY

SIGNATURE

NAME OF FIRM

DATE

WITNESSES (Full Name & Signature)

1. _____

Signature: _____

2. _____

Signature: _____

Date: _____

**CONTRACT FORM - RENDERING OF SERVICES
PART 2 (TO BE FILLED IN BY THE PURCHASER)**

1. I _____ in my capacity as _____
accept your quote under reference number _____ dated _____ for rendering of services indicated hereunder and/or further specified in the annexure(s).
2. An official order indicating service delivery instructions is forthcoming.
3. I undertake to make payment for the services rendered in accordance with the terms and conditions of the contract, within 30 (thirty) days after receipt of an invoice.

DESCRIPTION OF SERVICE	PRICE (ALL APPLICABLE TAXES INCLUDED)	COMPLETION DATE	B-BBEE STATUS LEVEL OF CONTRIBUTION	MINIMUM THRESHOLD FOR LOCAL PRODUCTION & CONTENT (if applicable)
SUPPLY AND INSTALL LUBRICATION SYSTEM				

4. I confirm that I am duly authorised to sign this contract.

SIGNED AT _____ ON _____ / _____ / _____

NAME (PRINT) _____ SIGNATURE _____

OFFICIAL COMPANY STAMP

WITNESSES (Full Name & Signature)	
1.	_____
	Signature: _____
2.	_____
	Signature: _____
	Date: _____