



BID DOCUMENT

BID NUMBER: MLM/BTO/INSUR/2026-2028

APPOINTMENT OF SHORT-TERM INSURANCE BROKING SERVICES FOR A PERIOD OF 36 MONTHS

Registered Name of Tenderer:	
Trading Name of Tenderer:	
Registration No. of Entity:	
Postal Address of Tenderer:	
Contact Person:	
Tel. No.:	
CIDB CRS Number(s):	
CSD Number(s):	MAAA
This tender closes at 12:00 on Tuesday, 20 May 2025 at the Municipal Hall, in offices of the Moretele Local Municipality located at 4065 B, Mathibestad, Makapanstad 0404	
NO LATE SUBMISSIONS WILL BE CONSIDERED	

Prepared For:

Moretele Local Municipality
4065 B, Mathibestad
Private Bag X367
MAKAPANSTAD
0404

Contact Name: Ms B Sathekge or Ms M Phenya
Telephone: (012) 716 1397 or (012) 716 1414

MORETELE LOCAL MUNICIPALITY

Tender No. MLM/BTO/INSUR/2026-2028
For
Appointment of Insurance broker for the short- term insurance portfolio for a
period of 36 months

Tender section of the document: Pages T1 – T68
Contract section of the document: Pages C1 – C83

CONTENTS

Section Number and Heading

The Tender

Part T1: Tendering Procedures

- T1.1 Tender Notice and Invitation to Tender
- T1.2 Tender Data

Part T2: Returnable Documents

- T2.1 List of Returnable Documents
- T2.2 Returnable Schedules

The Contract

Part C1: Agreements and Contract Data

- C1.1 Form of Offer and Acceptance
- C1.2 Contract Data
- C1.3 Form of Guarantee
- C1.4 Agreement in terms of Section 37(2) of the Occupational Health and Safety Act No. 85 of 1993
- C1.5 Retention Money Guarantee
- C1.6 Transfer of Rights

Part C2: Pricing Data

- C2.1 Pricing Instructions
- C2.2 Schedule of Quantities

Part C3: Scope of Work

- C3.1 Standard Specifications
- C3.2 Project Specifications
- C3.3 Particular Specifications

Part C4: Site Information

- C4.1 Locality Plan
- C4.2 Contract Signboard Details

T2

Employer

Witness 1

Witness 2

Broker

Witness 1

Witness 2

T1: TENDERING PROCEDURES

TABLE OF CONTENTS

T1.1	TENDER NOTICE AND INVITATION TO TENDER	T4
T1.2	TENDER DATA	T6



TENDER NOTICE AND INVITATION TO TENDER
Tender No. MLM/BTO/INSUR/20262028

For

APPOINTMENT OF SHORT-TERM INSURANCE BROKING SERVICES FOR A PERIOD OF 36 MONTHS

Tenders are hereby invited to provide brokerage services for short-term insurance for a period of 36 months.

Project Name	Bid Number	Compulsory Briefing Session	Bid Document Price	Availability of Bid Document	Evaluation Criteria	CIDB Grading	Closing Date and Time
Appointment of short-term insurance broking services for a period of 36 months	MLM/BTO/INSUR/2026-2028	Friday, 25 April 2025 at 11:00 hours in the Municipal Hall.	R1 000.00	22 April 2025	80/20 Price & BBBEE status level Minimum Qualifying Score: 70%		20 May 2025 at 12:00 hours

Bid documents with detailed bid specifications and detailed information are obtainable at the **Revenue office of Moretele Local Municipality, 4065 B Mathibestad (please check dates as per project)** at 08:00 – 16:00. A non-refundable deposit as per tender above payable at the bank as per the following details

Account Name: Moretele Local Municipality
Bank: ABSA
Cheque account No: 405 331 7014
Branch code: 632005
Ref: Company Name..... BID Number

NB: No cash will be accepted only proof of payment or Debit cards will be accepted.

Sealed Bids clearly marked “**BID No AND PROJECT NAME (as per the table above)**” must be placed in the Bid box situated at the offices of **MORETELE LOCAL MUNICIPALITY, 4065 B MATHIBESTAD**. Compulsory briefing will be done as per the project indicated in the table.

No late BIDs will be accepted.

Moretele Local Municipality reserves the right to accept the whole or part of any bid and further reserves the right to re-advertise if it so wishes to. No reason for the acceptance or rejection of any bid will be given.

Bids will be adjudicated according to the Moretele Local Municipality's Supply Chain Management Policy, the Preferential Procurement Policy Framework Act, (Act No. 5 of 2000) and the Preferential Procurement Regulations 2022, as well as the broad Based Black Economic Empowerment Act (Act 53 of 2003). Bids will remain valid for 90 days.

Inquiries may be directed to: Ms. B Sathekge Tel: (012) 716 1397 and Ms M Phenya Tel: (012) 716 1414

Mr S. Ngwenya
MUNICIPAL MANAGER

T4

Employer

Witness 1

Witness 2

Broker

Witness 1

Witness 2

T1.2 TENDER DATA

This bid is subject to the MLM supply chain management policy, preferential procurement policy framework act and the preferential procurement regulations, 2017, the general conditions of contract (gcc) and, if applicable, any other special conditions of contract.

The Standard Conditions of Tender make several references to the Tender Data for details that apply specifically to this tender. The Tender Data shall have precedence in the interpretation of any ambiguity or inconsistency between it and the standard conditions of the tender. Each item of data given below is cross-referenced to the clause in the Standard Conditions of Tender to which it mainly applies.

The following variations, amendments, and additions to the Standard Conditions of Tender as set out in the Tender Data below shall apply to this tender:

Clause Number	Data / Wording
C1.1	The Employer is the Moretele Local Municipality
C.1.2	<p>(a) The Tender Documents consist of the following:</p> <p>PART T1: TENDERING PROCEDURES T1.1 Tender Notice and Invitation to Tender T1.2 Tender Data</p> <p>PART T2: RETURNABLE DOCUMENTS T2.1 List of Returnable Documents T2.2 Returnable Schedules</p> <p>PART C1: AGREEMENTS AND CONTRACT DATA C1.1 Form of Offer and Acceptance C1.2 Contract Data C1.6 Transfer of Rights</p> <p>PART C2: PRICING DATA C2.1 Pricing Instructions C2.2 Schedule of Quantities</p> <p>PART C3: SCOPE OF WORKS C3.1 Standard Specifications C3.2 Project Specifications C3.3 Particular Specifications</p>
C.1.4	The Employer's agent for the purpose of this tender is deemed to be the authorized and designated representative of the Employer:
C.1.5	Cancellation and Re-Invitation of Tenders
C.1.5.1	<p>An Employer may, prior to the award of the tender, cancel a tender if</p> <p>a) due to changed circumstances, there is no longer a need for the engineering and construction works specified in the invitation. b) funds are no longer available to cover the total envisaged expenditure; or c) no acceptable tenders are received. d) there is a material irregularity in the tender process.</p>
C.1.5.2	The decision to cancel a tender invitation must be published in the same way the original tender invitation was advertised

T5

Employer	Witness 1	Witness 2	Broker	Witness 1	Witness 2

Clause Number	Data / Wording
C.1.5.3	An Employer may only with the prior approval of the relevant treasury cancel a tender invitation for the second time
C.2	Tenderer's obligations
C.2.1	<p>Eligibility Only those tenderers who satisfy the following criteria are eligible to submit tenders:</p> <p>The following are minimum requirements:</p> <ul style="list-style-type: none"> • The bidder must be a South African based Insurer or Broking Organization (attach proof). • The bidder must have R200m Professional Indemnity Cover (attach proof). • The bidder must have Fidelity Guarantee Cover (attach proof). • The bidder must have R250m Commercial Crime Cover (attach proof). • Valid Tax Clearance Certificate. • Registered with the following institutions: <ul style="list-style-type: none"> ➢ Financial Services Conduct Authority (FSCA) (Attach Proof) ➢ Financial Intermediaries Association (FIA) (Attach Proof) ➢ IISA Membership (Attach Proof). ➢ The Institute of Risk Management - South Africa (IRMSA) (Attach Proof)
C.2.1.1	<p>Only those bidders who satisfy the following eligibility criteria are eligible to submit bids:</p> <ol style="list-style-type: none"> a. the Contractor submitting the tender is under restrictions or has principals who are under restriction to participate in the Employer's procurement due to corrupt or fraudulent practices; b. the Tenderer does not have the legal capacity to enter into the contract; c. the Contractor submitting the tender is insolvent, in receivership, bankrupt or being wound up, has his affairs administered by a court or a judicial officer, has suspended his business activities, or is subject to legal proceedings in respect of the foregoing. d. The Tenderer does not comply with the legal requirements stated in the Employer's procurement policy; e. The Tenderer cannot demonstrate that he possesses the necessary professional and technical qualifications and competence, financial resources, equipment and other physical facilities, managerial capability, personnel, experience and reputation to perform the contract; f. The Tenderer cannot provide proof that he is in good standing with respect to duties, taxes, levies and contributions required in terms of legislation applicable to the work in the contract.
C.2.2	
C.2.2.1	The tenderer must be notified of all arithmetic errors, omissions and/or rate imbalances that are identified in the tender offer and request the tenderer to, within a stipulated time, accept the total of the rates / prices as corrected by the Employer's Agent without changing the tender amount / final offer.
C.2.2.2	<p>Cost of Tender The cost of the tender documents charged by the Employer shall be limited to the actual cost incurred by the Employer or Employer's Agent for printing the documents</p>
C.2.3	<p>Check Documents Check the tender documents on receipt for completeness and notify the Employer of any discrepancy or omission.</p>
C.2.4	Confidentiality and Copyright of Documents

T6

Employer

Witness 1

Witness 2

Broker

Witness 1

Witness 2

Clause Number	Data / Wording
	Treat as confidential all matters arising in connection with the tender. Use and copy the documents issued by the Employer only for the purpose of preparing and submitting a tender offer in response to the invitation.
C.2.6	Acknowledge Addenda Acknowledge receipt of addenda to the tender documents, which the Employer may issue, and if necessary, apply for an extension to the closing time stated in the tender data, in order to take the addenda into account.
C.2.7	Seek Clarification The arrangements and venue for the compulsory Clarification Meeting are: Venue: Moretele Local Municipality, Municipal Hall, 4065 B, Mathibestad, Makapanstad 0404. Date: 25 April 2025 at 11:00 Hours Contact Person: Anna Matlala Tel: (012)716 1397 /072 593 1845 Fax: Email: Anna.Matlala@Moretele.gov.za
C.2.8	Insurance Be aware that the extent of insurance to be provided by the Employer (if any) might not be for the full cover required in terms of the conditions of contract identified in the contract data. The tenderer is advised to seek qualified advice regarding insurance.
C.2.9	Pricing the Tender Offer
C.2.9.3	This contract shall not be subject to Contract Price Adjustments, foreign fluctuations, etc and all rates and prices shall remain fixed, final and binding for the full duration of this contract.
C.2.11	Alterations to Documents Do not make any alterations or additions to the tender documents, except to comply with instructions issued by the Employer, or necessary to correct errors made by the tenderer. All signatories to the tender offer shall initial all such alterations (refer to the standard condition of Tender).
C.2.12	Alternative Tender Offers No alternative tender offers will be considered
C.2.13	Submitting a tender offer
C.2.13.1	Submit one tender offer only as a single tendering entity to provide the whole of the works identified in the contract data and described in the scope of works, unless stated otherwise in the tender data
C.2.13.2	Return all returnable documents to the Employer after completing them in their entirety, either electronically (if they were issued in electronic format) or by writing legibly in non-erasable ink.
C.2.13.3	Submit the parts of the tender offer communicated on paper as an original plus the number of copies stated in the tender data, with an English translation of any documentation in a language other than English, and the parts communicated electronically in the same format as they were issued by the Employer.
C.2.13.4	Sign the original and all copies of the tender offer where required in terms of the tender data. The Employer will hold all authorized signatories liable on behalf of the tenderer. Signatories for tenderers proposing to contract as joint ventures shall state which of the signatories is the lead partner whom the Employer shall hold liable for the purpose of the tender offer.
C.2.13.5	Tender offers shall be submitted as original only. The package shall state on the outside the Employer's address and identification details stated in the tender data, as well as the tenderer's name and contact address. Under no circumstances whatsoever may the tender forms be retyped or redrafted. Photocopies of the original tender documentation may be used, but an original signature must appear on such photocopies.

T7

Employer

Witness 1

Witness 2

Broker

Witness 1

Witness 2

Clause Number	Data / Wording
C.2.13.6	<p>Bidders are requested to deliver the submission in one envelope. The Employer's address for delivery of tender offers and identification details to be shown on the tender offer package is:</p> <p>Title to appear on envelope one (1):</p> <p>"BID NUMBER: MLM/BTO/INSUR/26-28 APPOINTMENT OF INSURANCE BROKER: FOR THE SHORT-TERM INSURANCE PORTFORLIO FOR A PERIOD OF 36 MONTHS.</p> <p>This envelope must contain the returnable SCM Documentations, Relevant Annexures and Appendixes. This envelope must contain printed copies of all the pages in this document, duly completed and signed, inclusive of the pricing schedules (bill of quantities), which must be submitted in one envelope as detailed below.</p> <p>For identification purposes, bidders are requested to ensure that the envelopes containing the company's bids are clearly marked and are easily identifiable by the company's logo or name.</p> <p>The Employer's address for delivery of tender offers and identification details to be shown on each tender offer package are:</p> <p>Location of Tender Box: Moretele Local Municipality Physical Address: 4065 B, Mathibestad, Makapanstad 0404. Identification Details: Tender No. MLM/BTO/INSUR/2026-2028</p>
C.2.13.7	Seal the original tender offer in an outer package that states on the outside only the Employer's address and identification details as stated in the tender data. A two-envelope system will not be followed .
C.2.13.8	Accept that the Employer will not assume any responsibility for the misplacement or premature opening of the tender offer if the outer package is not sealed and marked as stated.
C.2.13.9	Accept that tender offers submitted by facsimile or e-mail and late tenders will be rejected by the Employer.
C.2.14	<p>Information and data to be completed in all respects</p> <p>Accept that tender offers, which do not provide all the data or information requested completely and, in the form, required, may be regarded by the Employer as non-responsive.</p>
C.2.15	<p>Closing time</p> <p>The closing time for submission of Tender Offers is: 12:00 on Tuesday, 20 May 2025.</p> <p>The Moretele Local Municipality is not obliged to accept the lowest or any tender and reserves the right to accept any tender in whole or in part.</p>
C.2.16	The tender offer validity period is ninety (90) days from the closing time for the submission of tenders.
C.2.18.2	Over and above the information resources stipulated in the evaluation criteria, the Tenderer shall, when requested by the Employer to do so, submit the names of all management and supervisory staff that will be employed to supervise the labour-intensive portion of the works together with satisfactory evidence that such staff members satisfy the eligibility requirements.
C.2.19 I	<p>Inspections, tests, and analysis</p> <p>Provide access during working hours to premises for inspections, tests and analysis as provided for in the tender data.</p>

T8

Employer

Witness 1

Witness 2

Broker

Witness 1

Witness 2

Clause Number	Data / Wording
C.2.20	Submit securities, bonds, and policies If requested, submit for the Employer's acceptance before formation of the contract, all securities, bonds, guarantees, policies, and certificates of insurance required in terms of the conditions of contract identified in the contract data.
C.2.23	The Tenderer is required to submit his/her tender with all documents and schedules listed under T2.1 and T2.2 The certificates as required in the Returnable Schedules and Forms must be provided with the tender for each party to a consortium / joint venture.
C.2.24	Canvassing and obtaining of additional information by tenderers The Tenderer shall not make any attempt either directly or indirectly to canvass any of the Employer's officials or the Employer's agent in respect of his tender, after the opening of the tenders but prior to the Employer arriving at a decision thereon. The Tenderer shall not make any attempt to obtain particulars of any relevant information, other than that disclosed at the opening of tenders.
C.2.25	Prohibitions on awards to persons in service of the state The Employer is prohibited to award a tender to a person - a. who is in the service of the state; or b. if that person is not a natural person, of which any director, manager, principal shareholder or c. stakeholder is a person in the service of the state; or d. a person who is an advisor or consultant contracted with the Municipality. In the service of the state means to be - a. a member of:- I. any municipal council; II. any provincial legislature; or III. the National Assembly or the National Council of Provinces; b. a member of the board of directors of any municipal entity; c. an official of any municipality or municipal entity; d. an employee of any national or provincial department; e. provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No.1 of 1999); f. a member of the accounting authority of any national or provincial public entity; or g. An employee of Parliament or a provincial legislature. In order to give effect to the above, the questionnaire for the declaration of interests in the tender of persons in service of state in part T2 of this procurement document must be completed.
C.3	The Employer's undertakings
C.3.1	Respond to requests from the tenderer The Employer will respond to requests for clarification received up to three (3) working days before the tender closing time
C.3.2	Issue Addenda Addenda will be issued until five (5) working days before the tender closing time.
C.3.5	The time and location for the opening of the tender offers are: Time: 12:00 on Tuesday, 20 May 2025 Location / Venue: Revenue Unit at the Finance Department of Moretele Local Municipality, 4065 B, Mathibestad, Makapanstad 0404
C.3.9	
C.3.9.1	Check the highest ranked tenders or tenderers with the highest number of tender evaluation points after the evaluation of tender offers in accordance with C.3 for:

T9

Employer

Witness 1

Witness 2

Broker

Witness 1

Witness 2

Clause Number	Data / Wording
	<ul style="list-style-type: none"> a. the gross misplacement of the decimal point in any unit rate; b. omissions made in completing the pricing schedule or bills of quantities; or c. arithmetic errors in line-item totals resulting from the product of a unit rate and a quantity in bills of quantities or schedules of prices; or the summation of the prices.
	<p>The arithmetical errors shall be corrected in the following manner:</p> <ul style="list-style-type: none"> a. Where there is a discrepancy between the amounts in words and amounts in figures, the amount in words shall govern. b. If bills of quantities or pricing schedules apply and there is an error in the line-item total resulting from the product of the unit rate and the quantity, the line item total shall govern and the rate shall be corrected. Where there is an obviously gross misplacement of the decimal point in the unit rate, the line-item total as quoted shall govern, and the unit rate shall be corrected. c. Where there is an error in the total of the prices either as a result of other Corrections required by this checking process or in the tenderer's addition of prices, the total of the prices shall govern, and the tenderer will be asked to revise selected item prices (and their rates if bills of quantities apply) to achieve the tendered total of the prices. <p>The Tender Offer will be rejected if the tenderer does not correct or accept the Correction of the arithmetical error in the manner described above</p>
C.3.11	<p>Functionality, Price and Preference</p> <p>The purpose of the evaluation is to ensure and promote compliance with the Constitution, specifically Section 217, which provides that when organs of state contract for goods or services, they must do so in accordance with a system which is fair, equitable, transparent, competitive and cost-effective. The evaluation of bids will be undertaken in 4 Stages/ Phases.</p>
C.3.12	<p>Breakdown points for Functionality points are outlined below. The procedure for the evaluation of responsive tenders is detailed as follows:</p> <p>Phase One: Responsiveness to the eligibility criteria, bid and mandatory requirements and rules. Tenderers that do not meet the compliance requirements stipulated above will be disqualified from further evaluation.</p> <p>Phase Two: Tenderers must meet the minimum requirements outlined in the functionality criteria and score at least the minimum functionality points to be considered for further evaluation. Tenderers which do not meet minimum functionality points of 70 will then be rejected.</p> <p>Phase Three: Bidders passing all stages above will thereafter be evaluated on PPPFA (80/20 or 90/10.)</p> <p>Phase Four: Objective criteria and Risk analysis</p>
	<p>PHASE ONE: RESPONSIVENESS TO THE ELIGIBILITY CRITERIA, BID AND MANDATORY REQUIREMENTS AND RULES:</p> <p>Tenderers' proposals must meet the following minimum requirements and supporting documents must be submitted with the completed bid document in a sealed envelope in the bid box at the closing date and time. Failure to comply will automatically eliminate the bid for further consideration:</p> <ol style="list-style-type: none"> 1. Tender Document (This Document must be submitted in its original format) 2. Tenders which are late, incomplete, unsigned or submitted by facsimile or electronically, will not be accepted. 3. Tenderer must be registered with Registered with the following institutions: <ol style="list-style-type: none"> 3.1. Financial Services Conduct Authority (FSCA) (Attach Proof) 3.2. Financial Intermediaries Association (FIA) (Attach Proof) 3.3. IISA Membership (Attach Proof).

T10

Employer

Witness 1

Witness 2

Broker

Witness 1

Witness 2

Clause Number	Data / Wording
	<p>4. Tenderer must be a legal entity or partnership or joint venture or consortia.</p> <p>5. Form of offer and Acceptance (fully completed and signed)</p> <p>6. MBD 4 - Declaration of Interest (fully completed and signed)</p> <p>7. MBD 5 - Declaration for procurement above R10 million (all applicable taxes included) - (fully completed and signed)</p> <p>8. MBD 8 - Declaration of Bidder's past Supply Chain Management Practices. (Completed and signed)</p> <p>9. MBD 9 - Certificate of Independent Bid Determination. (Completed and signed)</p> <p>10. Compulsory Enterprise Questionnaire (Completed and signed)</p> <p>11. If the offer (any of the items quoted for) is "Vat Inclusive", the VAT registration number of service provider must be indicated. Bidders are not entitled to claim the VAT if they are not VAT registered.</p> <p>12. Resolution to Sign (if applicable) must be completed and furnished with the tender.</p> <p>13. Attendance of compulsory briefing meeting (where applicable)</p> <p>14. Only one offer per item per bidder is allowed and alternative offers will not be considered. If more than one offer per item is received, none of the offers will be considered. Tenderers are also not allowed to submit a bid/ quotation whilst they are in agreement with other tenderers in the form of joint ventures or consortiums.</p> <p>15. Bidder (Company or director/partner or sole propriety) must attach proof of municipal rates on municipality letterhead which are not older than 90 days.</p> <ul style="list-style-type: none"> ➤ If the statement of municipal rates is not in the name of the bidder, an affidavit from SAPS must be attached or Letter of traditional authority not older than 90 days for the bidder. OR ➤ In case of a lease agreement, a signed lease agreement by both parties (lessor & lessee), an affidavit indicating that the bidder and/or the director does not have municipal account and that the municipal services, ➤ rates and taxes are paid by the property owner must be attached. ➤ The tenderer will be rejected if it has failed to pay municipal rates and taxes or municipal service charges and such rates if the account is in, taxes and charges (where they are applicable) are in arrears for more than three months. <p>16. If the tenderer is required by law to prepare annual financial statements for auditing, it must submit its audited annual financial statements— (aa) for the past three years; or (bb) since their establishment if established during the past three years.</p> <p>17. A letter of intent from a registered financial institution showing full details as guarantor in the amount of 10% as specified for surety purposes must be submitted.</p> <p>Other Conditions of bid (Non eliminating, unless expressly mentioned in the document):</p> <p>1. MBD 1 form</p> <p>2. The bidder must be registered on the Central Supplier Database (CSD) prior to the award.</p> <p>3. All tenderer's tax matters must be in order prior to award. Bidders' tax matters will be verified through CSD.</p> <p>4. The bidder must complete section 1.3.1.2 of the Preference Points Form to claim points on Specific goals. Non-completion of the schedule / form will result in a bidder losing preferential points.</p>

T11

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Employer	Witness 1	Witness 2	Broker	Witness 1	Witness 2

Clause Number	Data / Wording								
	<p>PHASE TWO: TENDER WHO PASS STAGE 1 WILL THEN BE EVALUATED ON FUNCTIONALITY CRITERIA, AS OUTLINED BELOW:</p> <ol style="list-style-type: none"> The tender will be expected to submit substantial information (valid copies and detailed information as ordered) to claim points for each of the criteria or sub criteria set. The tenderer must demonstrate to the satisfaction of the Employer that it has sufficient skill and capacity to execute the works. The form or the evaluation criteria and maximum score in respect of each of the criteria listed in 5.11.9. A Tender scoring an average score below 70 points in Functionality will be considered as DISQUALIFIED from evaluation and will be discarded from any further evaluation. Non-submission or poorly completed schedule or incomplete information will result in a tenderer losing points on Functionality. CVs which do not substantially detail relevant experience will also lead to a bidder losing points on Functionality, It is the responsibility of the tenderer to ensure that all copies are clear and certified when the conditions require them to be so. No second chance will be given to a tenderer to submit some information after tender closure on this stage of evaluation i.e. functionality. <p>PHASE THREE: EVALUATION POINTS ON PRICE AND SPECIFIED GOALS</p> <p>The 80/20 preference point system shall be applied for the purposes of this bid as per the requirements of the <i>Preferential Procurement Policy Framework Act, 2000</i> (Act No. 5 of 2000).</p> <table border="1"> <thead> <tr> <th>Criteria</th><th>Points</th></tr> </thead> <tbody> <tr> <td>Points on Price</td><td>80</td></tr> <tr> <td>Specified Goals</td><td>20</td></tr> <tr> <td>Total</td><td>100</td></tr> </tbody> </table> <p>The 80/20 preference point system for acquisition of services, works or goods up to Rand value of R50 million:</p> <p>(a) The following formula must be used to calculate the points for price in respect of tenders (including price quotation) with a Rand value equal to, or above R 30 000 and up to Rand value of R 50 000 000 (all applicable taxes included):</p> <p>The financial offer will be scored using the following formula: $A = (1 - \frac{P - P_m}{P_m})$</p> <p>The value of value of W_1 is:</p> <ol style="list-style-type: none"> 90 where the financial value inclusive of VAT of all responsive tenders received have a value in excess of R50 000 000 or 80 where the financial value inclusive of VAT of one or more responsive tender offers have a value that equals or is less than R 50 000 000. <p>The table below must be used to calculate the score out of 20 for Specified Goals</p>	Criteria	Points	Points on Price	80	Specified Goals	20	Total	100
Criteria	Points								
Points on Price	80								
Specified Goals	20								
Total	100								

T12

Employer	Witness 1	Witness 2	Broker	Witness 1	Witness 2

Clause Number	Data / Wording				
	The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
	Points for 51% black owner	--	5	--	
	Points for 51% Women's Equity	--	5	--	
	Points for 51% owned Youth firm	--	5	--	
	Points for Locality (Within the jurisdiction of Northwest)	--	5	--	
	<p>NOTE:</p> <p>The tenderer must submit a CSD number, CIPC documents indicating share ownership or directorship of the company or a comprehensive CSD report which must indicate the names of the owners, their gender, race, age, whether there is a person living with disability or not and the address of a company (first address on CSD), in order to claim the preferential procurement points.</p> <p>PHASE FOUR: OBJECTIVE CRITERIA AND RISK ANALYSIS</p> <p>1. The Employer reserves the right not to appoint the highest point scorer, when any of the objective criteria are taken into consideration:</p> <p>When the tenderer has any of the following:</p> <ol style="list-style-type: none"> It is litigating against the Employer on matters relating to tender processes and such processes have not been concluded by the courts of the country. It must be noted that the financial health of the tenderer will be assessed, if deemed necessary, to ensure that the service provider will be able to operate as per required deliverable. It may be overlooked if the Employer is not satisfied that the tenderer will be able to deliver to the tenders of the contract. The tenderer has unduly high or unduly low tendered rates in the tender offer. In this regard, and a financial risk analysis has been performed to verify whether the costs are reasonable and balanced. In terms of unduly high tendered amounts in the tender offer, negotiation process as outlined in Regulation 24 of the MFMA Regulations will apply. <p>2. This tender will be considered as a whole. All trades listed in the Bills of Quantities or Pricing schedule must be priced for (except provisional sums and allowances), failure to do so will increase the commercial risk of the tender and may lead to elimination or passing over of the tenderer.</p> <p>Tenders may be disqualified if tendered rates are found to be distorted. The market average of received bid prices excluding Outliers, as well as the Moretele Local Municipality estimate will be used as a guide to indicate financial risk.</p>				

T13

Employer

Witness 1

Witness 2

Broker

Witness 1

Witness 2

Clause Number	Data / Wording
C.3.11.9	<p>All proposals will be evaluated in terms of functionality with a maximum of 100 functionality points. All proposals meeting minimum scores of 70 points will be considered for the next final evaluation stage whereby proposals will be evaluated in terms of Price and Preference.</p> <p>The score for functionality will be calculated using the following formula:</p> $W_Q = W_2 \times \frac{S_o}{M_s}$ <p>Where:</p> <p>W₂ = is the percentage score given for quality and equals 100</p> <p>S_o = is the maximum possible score for quality allocated to the submission under consideration</p> <p>M_s = is the maximum possible score for quality in respect to the submission</p> <p>The quality will comprise scores for the following based on criteria indicated in the respective tender returnable schedules:</p>

T14

Employer

Witness 1

Witness 2

Broker

Witness 1

Witness 2

TERMS OF REFERENCE/ SPECIFICATIONS

1. INTRODUCTION

The Municipality hereby invites tenders from reputable Short-term Insurance Intermediaries, who are members of the Financial Intermediaries Association (F.I.A.) and who comply with the Financial Advisory and Intermediary Services (F.A.I.S.) Act, for the Management of the Short-term Insurance Portfolio of the Municipality for a contract of 36 months

The purpose of this bid is to ensure that the municipality maintains risk management by procuring the services of a broker to ensure cost effective and efficient insurance for the assets of the municipality.

2. BACKGROUND

- 2.1. Tenders must be compliant with all bid requirements stated in the tender document. Bidders are specifically referred to the requirements of the Preferential Procurement Regulations, 2022, including but not limited to prequalification criteria, functionality, eligibility, statutory, local content, compulsory sub-contracting, other objective, and price and preference criteria as stated in the tender document. Tenderers' attention is drawn to the registration requirements in the tender documents in respect of registration on the municipal supplier database, Central Suppliers' Database, etc.
- 2.2. To comply with the above Act and to ensure that the Municipality's assets are adequately insured, and any risk exposure is minimized, the Municipality needs to appoint a Service Provider to perform the following functions:
 - 2.2.1. Negotiate and place the Municipality's insurance portfolio with insurance underwriters and present the underwriting terms to the Municipality for acceptance each year;
 - 2.2.2. Administer the Municipality's short-term insurance portfolio; and
- 2.3. Assess the Municipality's insurance cover and provide advice on adequate cover to be taken out. The renewal of the insurance portfolio normally falls in line with the Municipality's financial year-end and therefore must be renewed each year to ensure that the Municipal assets are insured, and the liabilities are minimized.

2.4. BASIS FOR TENDERING

The submitted tenders will be adjudicated in accordance with the technical and performance specifications as outlined in the tender. Evaluation of tenders will follow the requirement of the Preferential Procurement Policy Framework Act (Act 5 of 2000) and Regulation Preferential Procurement Regulations, 2022. It will be required from the selected Short-Term Insurance Broker to break down the Insurance Portfolio of the Moretele Local Municipality in the local and/or international insurance market in accordance with specific criteria.

The emphasis will be on technical proposals made to the Moretele Local Municipality on the most cost-effective placement of the insurance portfolio in the insurance market, taking into serious consideration the mitigation of business risks and financial risks exposures.

The tender will call for technical and performance specifications of a Short-Term Insurance Broker for the period of 36 months. The requirements of Section 33(1) of Act No. 56 of 2003 will

T15

Employer

Witness 1

Witness 2

Broker

Witness 1

Witness 2

be adhered to. The Municipality reserves the right upon the expiry of the contract to further extend the contract for two years with the successful bidder.

Cognizance should be taken that the appointed Short-Term Insurance Broker will not be allowed to increase their insurance premium in year 2 (two) and 3 (three) with more than the CPIX, unless substantiating proof from the quotations received from the insurers reflect a hardening insurance market based on valid known claims incidents.

In the event of organic growth of the portfolio including but not limited to inflationary increase of the sums insured and inclusion of additional cover and services the afore going rule limiting the premium growth to CPIX shall not apply. Quotations received by Short Term Insurance Broker from the insurers must annually with renewal be made available to the Moretele Local Municipality for scrutiny and approval by the Accounting Officer and the Chief Financial Officer.

3. GENERAL

It is emphasized that a contract will not necessarily result from the responses received to this request for proposal. Moretele Local Municipality reserves the right to enter negotiations with any one or more of the respondents, should it be decided to proceed with the contract.

Moretele Local Municipality reserves the right not to evaluate and/or consider any proposals that does not comply strictly with the requirements as set out in this request.

Moretele Local Municipality reserves the right to make a decision /selection based solely on the information received in the proposals to this request.

To be considered for this tender you must be registered with the Financial Sector Conduct Authority and (FSCA) and Financial Intermediaries Association of South Africa (FIAS) or any other reputable association recognized by FSCA.

Furthermore, to point 4, you will have to achieve a technical acceptability threshold of 70 out of 100 points in terms of the services required as per the DETAILED TENDER SPECIFICATION.

Scoring as indicated above will be calculated with the completion of the Compulsory Questionnaire. The number of questions responded to in the affirmative with the necessary proof provided, will be expressed as a % of the total number of questions.

The bid will be evaluated and adjudicated in accordance with the 90/10 points system prescribed in the Preferential Procurement Policy Framework Act, (Act No 5 of 2000)

4. SCOPE OF WORK

The scope of work will be as follows:

4. 1. The appointed Service Provider will be required to perform the following:

4.1.1. Assess the Municipality's insurance requirements as reflected in the Tender Specification;

4.1.2. Submit the Municipality's information regarding the latest insurance statistics to the proposed Insurance Underwriters;

4.1.3. Negotiate with the Insurance Underwriters on suitable insurance terms and premiums based on the quotations obtained by the Service Provider as set out in paragraph 6.3;

T16

Employer

Witness 1

Witness 2

Broker

Witness 1

Witness 2

4.1.4. Attend insurance pre-placement meeting(s) with the Municipality to discuss the underwriting terms and premiums;

4.1.5. Advise the Municipality and provide quotations on additional insurance cover that might be necessary to take out to ensure that the Municipality's risk is minimized;

4.1.6. Place the Municipality's insurance portfolio with the Insurance Underwriters and provide the Municipality with written confirmation thereof together with details of the insurance cover placed.

4.2 Underwriting Administration

The appointed Service Provider will be required to perform the following:

4.2.1 Provide quotations on any additional insurance cover required by the Municipality and place the insurance cover with the Insurance Underwriters on the Municipality's instruction and provide the Municipality with written confirmation thereof together with details of the insurance cover placed;

4.2.2. Meet with the Municipality's Officials whenever required by either party to discuss and advise on insurance cover. The Service Provider's staff members required at these meetings will depend on the technicality of the issues to be discussed.

4.3 Claims Administration

The appointed Service Provider will be responsible to handle all aspects of claims as the Municipality will not communicate directly to any legal representatives of the service provider, third parties or the Underwriter where the insurance is placed.

The appointed Service Provider will be required to perform at least the following:

4.3.1. Administer all the Municipality's insurance claims, which fall under the various categories of the insurance policies;

4.3.2 Administer all claims received by the Municipality from third party's claiming for personal injury or damage to their property. This includes liaising with the third parties on the Municipality's behalf;

4.3.3 Provide a motivation, based on substantive legal grounds, for all claims that are rejected by the Insurance Company. The Municipality reserves the right to reconsider any opinion received, to refer it back to the Broker for another opinion or recommendation. The Municipality will under no circumstances communicate directly with the Underwriter regarding any aspects of a claim;

4.3.4 Submit monthly updated reports in respect of all of the Municipality's claims submitted, indicating the status of each claim;

4.3.5 Meet with the Municipality's relevant officials, individually or in groups, whenever required by either party to discuss and advise on insurance claims.

4.4 The appointed Service Provider will be required to perform the following before the renewal in respect of each year:

4.4.1. Assess the Municipality's insurance requirements as reflected in the insurance policy;

4.4.2. Compile updated information for the Municipality with regard to the latest insurance statistics and submit this information to the Insurance Underwriters;

4.4.3. Negotiate with the Insurance Underwriters on suitable insurance terms and premium is based on the Municipality's existing insurance cover and updated asset register;

4.4.4. Attend insurance pre-renewal meeting(s) with the Municipality in respectively to discuss the underwriting terms and premiums;

4.4.5. Advise the Municipality and provide quotations on additional insurance cover that could become necessary to be taken out to ensure that the Municipality's risk is minimized;

4.4.6. A Service Plan should be drawn annually with inception of a new insurance period detailing the actions to be taken in accordance with the Annual Placement Programme as well as an Annual Maintenance Programme for claims administration. The Portfolio Service and Maintenance Plan should reflect at least the following general insurance actions:

- Internal and external discussions to set renewal and maintenance strategy;
- Internal Strategy meetings;
- Review existing cover;
- Established uninsured risks and internal self-insurance capacity;
- Review cover, limits and sums insured;
- Review uninsured risks and exposure;
- Re-broking and market exercise to obtain renewal terms;
- Alignment of Insurance and Risk Management Philosophy;
- Pre-renewal meeting to discuss excess structures and alternatives of renewal;
- Renewal follow-up on alternative quotations;
- Presentation of renewal terms and recommended options;
- Confirmation of placement and 100% cover;
- Confirmation of credit rating of insurance and re-insurance markets;
- Premium allocations on recommended aggregates and service fees;
- Compilation of detailed insurance manual as well as full summary on cover, limits, conditions and exclusions;
- Check and provide issued policy as well as legal confirmation of statutory compliance;
- Quarterly claims audit and recommendations;
- Compilation of claims procedural manual
- Ad hoc adjustments and endorsements on sums insured and declarations to insurers/re-insures;
- Day-to-day correspondence and queries;
- Monitor premium payments and refunds in accordance with accounts and statement;
- Ad hoc training where required in terms of policy and procedural manual.

4.5. Handling of ongoing Claims

4.5.1. All claims that are ongoing / open must be covered by the current Service Provider,

4.5.2. Public Liability claims are dealt with on a claims-made basis, therefore any Public Liability claims received will be dealt with by the current Service Provider. Public Liability claims received on or after the commencement date of the contract with the newly appointed Service Provider will be dealt with by the newly appointed Service Provide where the actual date of loss is before said date.

5. Statement of Requirements

5.1.1 A tender will NOT be regarded as an acceptable tender / responsive if it fails to achieve the minimum qualifying score of **70 out of a maximum of 100**;

5.1.2. Tenderers must ensure that all relevant information as required per the pre-qualification criteria as set out below, has been submitted with the tender submission to ensure optimal scoring;

5.1.3. Tenders that have achieved the minimum qualifying score shall be evaluated further in terms of the preference point system;

5.1.4. The evaluation of tenders will be done in terms of compliance to the below-mentioned criteria and bidders can potentially score a total of 70 points for the following:

The Successful service provider will be required to submit the following documents before commencement of the project.

- 1. Registration with the Financial Sector Conduct Authority, attach a valid certified confirmation from the Financial Sector Conduct Authority reflecting the individuals registered.**
- 2. Risk Finance Resource, provide details and particulars of representatives.**
- 3. Professional Indemnity cover to the value of R50m, attach proof.**
- 4. Fidelity Guarantee cover to the value of R50 million, attach proof.**

5.2 EVALUATION CRITERIA

5.2.1. Tenders will be evaluated on a comparative basis, which is the reason for the design of the tender specification and additional schedules containing the detail information for inclusion on the insurance portfolio;

5.2.2. All tenders received shall be evaluated in accordance with the Municipal Finance Management Act, Act 56 of 2003 (read with its accompanying Supply Chain Management Regulations), Moretele Municipality's SCM Policy and the Preferential Procurement Policy Framework Act, Act 5 of 2000 (read with its accompanying regulations).

5.2.3. Acceptable bids will be evaluated by using a two-phased bidding system that awards points based on 80 points for functionality and **20 points for Price and specific goals**.

The 80 points will be divided into 80 for functionality and 20 for pricing and specific goals, while the functionality will be evaluated as follows:

Evaluation Criteria		Scoring System	Maximum Score	Tenderer Score
	The tenderer shall attach evidence of implemented traceable Work. The experience of the Tenderer or joint venture partners in a consortium will be evaluated based on experience in similar work or similar areas and conditions in relation to the scope of work required for this project.			
	1. Tenderers to provide appointment letters, and			

T19

Employer

Witness 1

Witness 2

Broker

Witness 1

Witness 2

	2. Signed and stamped reference letters on a template provided by Moretele Local Municipality. Refer to “Form G” in T2.2. Note: Completed reference forms shall be verified with the employer/client. Failure to submit the signed and stamped reference letter will result to forfeiture of all points for that particular project.				
1.	Company experience: Experience of the tenderer in years of operation as short-term Insurance Broker.	Similar Tender Experience	40	40%	
		Over 5 similar projects (Appointment letters and reference letters)	40		
		4 - 5 similar projects (Appointment letters and reference letters)	30		
		3 - 4 similar projects (Appointment letters and reference letters)	20		
		1 - 2 similar projects (Appointment letters and reference letters)	10		
		No attachments	0		
2.	Methodology and Framework	Effective & efficient administration of claims <ul style="list-style-type: none">• Turnaround times• Claims authorised/approved.• Float handling and reporting	20	20%	
		Poor	5		
		Average	10		
		Good	15		
		Excellent	20		
3.	Key Personnel Experience and qualification of Key Staff Note: Name/s of various employees occupying the positions below must be stated; certified copies (not older than 3 months) of qualifications	3.1 Key Personnel	20	20%	
		Underwriting. Minimum qualification in short-term insurance NFQ 5 Experience of more than 10 years in Municipal or Commercial underwriting Claims personnel Underwriting. Minimum qualification in short-term insurance NFQ 5 Experience of more than 10 years in Municipal or Commercial underwriting			
		Underwriting.	10		

T20

Employer	Witness 1	Witness 2	Broker	Witness 1	Witness 2

	must be attached to qualify for points.	<p>Minimum qualification in short-term insurance NFQ 5 Experience for 5 – 9 years in Municipal or Commercial underwriting</p> <p>Claims personnel Underwriting. Minimum qualification in short-term insurance NFQ 5 Experience for 5- 9 years in Municipal or Commercial underwriting</p>			
		<p>Underwriting. Minimum qualification in short-term insurance certificate Experience of less than 5 years in Municipal or Commercial underwriting</p> <p>Claims personnel Underwriting. Minimum qualification in short-term insurance certificate Experience of less than 5 years in Municipal or Commercial underwriting</p>	5		
4.	Proof of valid registration of Representative of the short-term insurance broker who will be responsible for the portfolio of the Municipality, with the Financial Sector Conduct Authority (FSCA), previously known as the Financial Services Board (FSB).	Proof of Registration	20	20%	
		<p>4.1. Proof of valid registration with the Financial Sector Conduct Authority (FSCA). 4.2. Proof of Financial Intermediaries Association (FIA) 4.3. Proof of good standing with Insurance Institution of South Africa (IISA).</p>	20		
		No proof of valid registration with the Financial Sector Conduct Authority (FSCA).	0		
				100	
TOTAL EVALUATION POINTS SCORE FOR QUALITY, TENDERERS WITH A SCORE OF LESS THAN 70% WILL BE REJECTED AS NON-RESPONSIVE				100%	

T21

Employer

Witness 1

Witness 2

Broker

Witness 1

Witness 2

SPECIFIED GOALS ALLOCATION TABLE	The specific goals allocated points in terms of this tender		
		Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
	Points for 51% black owner	5	
	Points for 51% Women's Equity	5	
	Points for 51% owned Youth firm	5	
	Points for Locality (Within the jurisdiction of Northwest)	5	
	TOTAL EVALUATION POINTS SCORE FOR SPECIFIED GOALS	20	

5.3 Pricing Requirements

5.3.1. Tender prices must be in ZAR Currency (Rand);

5.3.2. Tender rates must be submitted exclusive of VAT, but the final bid price submitted must include VAT;

5.3.3. The tenderer must provide maximum amounts payable per line item, in respect of Excess Payments for each asset, as per applicable column in the detailed pricing schedules. In these instances, where maximum amounts will not be tendered on any specific asset, this should be stated clearly as such next to the particular line item, and the applicable rate must then be stated for these exceptions;

5.3.4. All Brokers fees and any other administrative fees that will be payable, must Be indicated as separate items in the Gross insurance premium tendered;

5.3.5. Where extensions are granted free of charge, please state "free" in t Premium column;

5.3.6. Where a line of cover or an extension is not tendered for, please state "No Tender" in the premium column;

5.3.7. The liability for payment of Assessor Fees must be for the account of the tenderer in all instances, inclusive of alternative tenders.

5.3.8. The premium tendered must remain firm for the initial period of 12 months, Thereafter the annual escalation in the Rand value of the premium for year 2 and 3 must not exceed the reasonably anticipated industry-related CPI as at 30 April of each year;

5.3.9. The annual renewal premium for the outer two years will be based on the Escalated premiums quoted as per paragraph 5.3.8, subject to any addition and / or reductions required as per the updated information supplied by the Municipality.

T22

Employer

Witness 1

Witness 2

Broker

Witness 1

Witness 2

5.3.10. Pricing Schedule: A summary of assets attached as Annexure A must be used to determine the pricing

5.3.11 Total Sum of values of is items listed in 5.4 “Detail Cover”: As per the table submitted the bidder is required to provide Three-year pricing schedule. The increase will be based on the CPI applicable on the anniversary of the contract.

Policy item	Insured Amount (Assets as at 30 June 2024)	Risk indicator	Cover amount	SASRIA premium	Year 01 (incl of VAT)
Assets					
Buildings	40 197 709.38				
Buildings community assets	96 821 352.63				
Infrastructure	1 013 604 256.66				
Furniture and Fixtures	4 901 110.84				
IT equipment	23 045 165.06				
Motor Vehicles	14 375 112.02				
CAR HIRE					
Executive Mayor					
Speaker					
Single Whip					
SASRIA [52 Councillors]					
TOTAL BROKER FEE					
TOTAL PREMIUM					

The increment of outer years completes the below table

T23

Employer	Witness 1	Witness 2	Broker	Witness 1	Witness 2

Policy item	Risk indicator	Cover amount	SASRIA premium	Year 02 (incl of VAT)	Year 02(incl of VAT)
Assets					
Buildings					
Buildings community assets					
Infrastructure					
Furniture and Fixtures					
IT equipment					
Motor Vehicles					
CAR HIRE					
Executive Mayor					
Speaker					
Single Whip					
SASRIA [52 Councillors]					
TOTAL BROKER FEE					
TOTAL PREMIUM					

TOTAL BID AMOUNT INCLUSIVE OF VAT:.....

T2: RETURNABLE DOCUMENTS

T2.1 LIST OF RETURNABLE DOCUMENTS

The following documents are to be completed and returned as they constitute the tender. Whilst many of the returnable are required for the purpose of evaluating the tenders, some will form part of the subsequent contract, as they form the basis of the tender offer. For this reason, it is very important that tenderers return all information requested.

T2.2 RETURNABLE SCHEDULES REQUIRED FOR TENDER RESPONSIVENESS AND FOR TENDER EVALUATION PURPOSES

A	Certificate of Attendance at Clarification Meeting	T23
B	Record of Addenda to Tender Documents	T24
C	Certificate of Authority (On Company Letterhead)	T25
D	Compulsory Enterprise Questionnaire	T26
E	Experience of Tenderer (Schedule of Work Satisfactorily Carried out by Tenderer)	T27
F	Evaluation Schedule: Experience on Previous Project References)	T28
G	Key Personnel (Schedule)	T29
H	Deviations and Qualifications	T30
I	Contractor's Health and Safety Declaration	T31
J	Schedule of Alternative Tenders	T32
K	Tenderer's Banking Details and Rating	T33
L	Municipal Account for The Business / Directors Not Owing for More Than 90 Days or Municipal Account from Private Provider or Statement of Account from Landlord with Valid Lease Agreement.	T34
M	CIDB Registration Certificate	T35
N	Proof of Registration of Bidder and Certified ID Copies of Owners/Directors/Shareholders	T36
O	Complied CSD Summary Report	T37
P	MBD 4: Declaration of Interest	T38
Q	MBD 5: Declaration for Procurement Above R10 Million (VAT Included)	T39
R	MBD 6.1 Preference Points Claim Form in Terms of The Preferential Procurement	T40
S	MBD 7.2: Contract Form – Rendering Services	T41
T	MBD 8: Declaration of Bidder's Past Supply Chain Management Practices	T42
V	MBD 9: Certificate of Independent Bid Determination	T43

NOTE: The Tenderer is required to complete each and every schedule and form listed above to the best of his ability as the evaluation of tenders and the eventual contract will be based on the information provided by the Tenderer. Failure of a Tenderer to complete the schedules and forms to the satisfaction of the Employer may lead to rejection on the grounds that the tender is not responsive.

T25

Employer

Witness 1

Witness 2

Broker

Witness 1

Witness 2

T2.3 SUMMARISED DOCUMENTS REQUIRED FOR TENDER RESPONSIVENESS (Mandatory)

1. Municipal account for the business and directors not in arrears for more than 90 days or municipal account from a private provider or statement of account from the landlord with the valid lease agreement.
2. Certified Company registration certificate
3. Valid CIDB Registration confirmation
4. Completed and signed Form of Offer and Acceptance
5. Certified ID Copies of Owners/Directors/Shareholders
6. All pages signed, initialled, and completed.
7. Compliant CSD summary report
8. Authority for Signatory on company letterhead
9. Proof of purchase of the tender document
10. Joint venture (JV) agreement if applicable
11. Compulsory Enterprise questionnaires (MBD Forms)
12. Compulsory briefing certificate

NB. Failure to adhere to the above conditions will lead to automatic disqualification.

T26

Employer

Witness 1

Witness 2

Broker

Witness 1

Witness 2

A. CERTIFICATE OF ATTENDANCE AT CLARIFICATION MEETING

This is to certify that (*Tenderer*)

of (*address*)

.....
was represented by the person(s) named below at the compulsory clarification meeting held for all Tenderers **Moretele Local Municipality, 4065 B, Mathibestad, Makapanstad 0404. (Refer to the Clarification Meeting Venue Plan in Section T1.1)**

I / We acknowledge that the purpose of the meeting was to acquaint myself/ourselves with the site of the works and/or matters incidental to doing the work specified in the tender documents in order for me/us to take account of everything necessary when compiling our rates and prices included in the tender.

Particulars of the person attending the meeting:

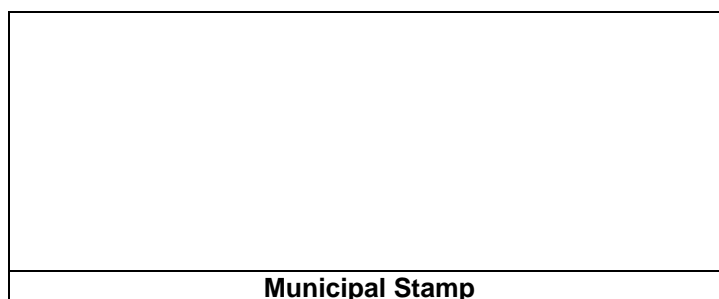
Name: Signature:

Capacity:

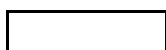
Attendance of the above person at the meeting is confirmed by the Employer's Agent, namely:

Name: Signature:

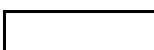
Capacity: Date and Time:



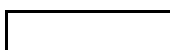
T27



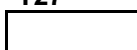
Employer



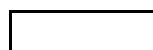
Witness 1



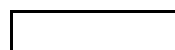
Witness 2



Broker



Witness 1



Witness 2

B. RECORD OF ADDENDA TO TENDER DOCUMENTS

The undersigned confirm that the following communications received from the Employer before the submission of this tender offer, amending the tender documents, have been taken into account in this tender offer:

	Date	Title or Details
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

Please attach all Addenda to this page

SIGNATURE:

DATE:

(Of person authorised to sign on behalf of the Tenderer)

C. CERTIFICATE OF AUTHORITY

The Tenderer must indicate the enterprise status by ticking the appropriate box hereunder.

(I) SOLE PROPRIETOR	(II) CLOSE CORPORATION	(III) PARTNERSHIP	(IV) COMPANY	(V) JOINT VENTURE

The Tenderer must complete the relevant certificate/s set out hereafter or must provide a certificate authorising the signatory on behalf of the enterprise(s).

(I) CERTIFICATE FOR SOLE PROPRIETOR

I....., hereby confirm that I am the sole owner of the

business trading as:.....

Specimen Signature of Sole Owner:

Date:

(II) CERTIFICATE FOR CLOSE CORPORATION

I / We, the undersigned, being the key members in the business trading as.....

..... Hereby authorise Mr/Ms,

acting in the capacity of, to sign all documents in connection with the tender for Contract No. and any contract resulting from it on our behalf.

Signatures of Members:

NAME	ADDRESS	SIGNATURE	DATE

T29

Employer

Witness 1

Witness 2

Broker

Witness 1

Witness 2

Note: *This certificate is to be completed and signed by all of the key members upon whom rests the direction of the affairs of the Close Corporation as a whole.*

Specimen Signature of Signatory:

Date:

(III) CERTIFICATE FOR PARTNERSHIP

We, the undersigned, being the key partners in the business trading as

.....

hereby authorise Mr/Ms

acting in the capacity of, to sign all documents in connection with the

tender for Contract No. and any contract resulting from it on

our behalf.

NAME	ADDRESS	SIGNATURE	DATE

Note: *This certificate is to be completed and signed by all of the key partners upon whom rests the direction of the affairs of the Partnership as a whole.*

Specimen Signature of Signatory:

Date:

(IV) CERTIFICATE FOR COMPANY

I, chairperson of the Board of Directors

of, hereby confirm that by resolution of the Board

(copy attached) taken on 20.....,

Mr/Ms, acting in the capacity of

....., was authorised to sign all documents in connection with this tender and any contract resulting from it on behalf of the company.

Signature of Chairman:

Specimen Signature of Signatory:

Date:

T31

--	--	--	--	--	--

Employer

Witness 1

Witness 2

Broker

Witness 1

Witness 2

(V) CERTIFICATE FOR JOINT VENTURE

We, the undersigned, are submitting this tender offer in Joint Venture and hereby authorize

Mr/Ms.....authorized signatory of the company,.....
acting in the capacity of lead partner, to sign all documents in connection with the tender offer for Contract
.....and any contract resulting from it, on our behalf.

This authorization is evidenced by the attached power of attorney signed by legally authorized signatories of all the partners to the Joint Venture.

NAME OF FIRM	ADDRESS	AUTHORIZING SIGNATURE NAME AND CAPACITY
Lead Partner		

Note: *This certificate is to be completed and signed by all of the key partners upon whom rests the direction of the affairs of the Partnership as a whole.*

D. COMPULSORY ENTERPRISE QUESTIONNAIRE

The following particulars must be furnished:

The following particulars must be furnished. In the case of a joint venture, separate enterprise questionnaires in respect of each partner must be completed and submitted.			
Section 1: Name of enterprise:			
Section 2: VAT registration number, if any:			
Section 3: CIDB registration number, if any:			
Section 4: CSD number:			
Section 5: Particulars of sole proprietors and partners in partnerships:			
Name*	Identity number*	Personal income tax number*	
* Complete only if sole proprietor or partnership and attach separate page if more than 3 partners			
Section 6: Particulars of companies and close corporations			
Company registration number:			
Close corporation number:			
Tax reference number:			
Section 7: SBD4 issued by National Treasury must be completed for each tender and be attached as a tender requirement.			
Section 8: SBD 6 issued by National Treasury must be completed for each tender and be attached as a tender requirement.			
Section 9: SBD8 issued by National Treasury must be completed for each tender and be attached as a tender requirement.			
Section 10: SBD9 issued by National Treasury must be completed for each tender and be attached as a tender requirement.			
The undersigned, who warrants that he / she is duly authorised to do so on behalf of the enterprise:			
i) authorizes the Employer to verify the tenderers tax clearance status from the South African Revenue Services that it is in order;			
ii) confirms that the neither the name of the enterprise or the name of any partner, manager, director or other person, who wholly or partly exercises or may exercise, control over the enterprise appears on the Register of Tender Defaulters established in terms of the Prevention and Combating of Corrupt Activities Act of 2004;			
iii) confirms that no partner, member, director or other person, who wholly or partly exercises, or may exercise, control over the enterprise appears, has within the last five years been convicted of fraud or corruption.			
iv) confirms that I / we are not associated, linked or involved with any other tendering entities submitting tender offers and have no other relationship with any of the tenderers or those responsible for compiling the scope of work that could cause or be interpreted as a conflict of interest; and			
v) confirms that the contents of this questionnaire are within my personal knowledge and are to the best of my belief both true and correct.			
Signed		Date	
Name		Position	
Enterprise Name			

T33

Employer	Witness 1	Witness 2	Broker	Witness 1	Witness 2

E. EXPERIENCE OF TENDERER

The following is a statement of work of similar nature recently successfully executed by myself / ourselves:

EMPLOYER: CONTACT PERSON AND TELEPHONE NUMBER	CONTACT PERSON AND TELEPHONE NUMBER	NATURE OF WORK	VALUE OF WORK (inclusive of VAT)	DATE COMPLETED OR EXPECTED TO BE COMPLETED

Attach additional pages if more space is required

SIGNATURE:

DATE:

(of person authorised to sign on behalf of the Tenderer)

F. EVALUATION SCHEDULE: EXPERIENCE ON PREVIOUS WORK REFERENCES

FORM 1. EXPERIENCE ON PREVIOUS WORK REFERENCES: FOR RECOMMENDATION PURPOSES

The following is to be completed by the Client and are to be supported in each case accompanied by a
(i) Signed Appointment Letter; (ii) Signed and Stamped Reference (in the form issued to the tenderer)

WORK NAME 1:

Name of Client:

Name of the Contractor:

Tender Amount (VAT included)

Name of Project and Description:

Contract Duration:

RATE SERVICE PROVIDER ON THEIR OVERALL PERFORMANCE

DESCRIPTION	SCORE	TICK APPROPRIATE SCORING
Very Good	5	
Good	4	
Fair	3	
Poor	2	
Not Acceptable	0	

Any other remarks considered necessary to assist in the evaluation of the Service Provider?

Client Contact Person: Telephone:

I hereby declare that to the best of my knowledge, the information completed above is true and correct and I understand that I will be held responsible for any misrepresentation.

Client Signature: Date:

CLIENT STAMP

T35

--

Employer

--

Witness 1

--

Witness 2

--

Broker

--

Witness 1

--

Witness 2

FORM 2. EXPERIENCE ON PREVIOUS WORK REFERENCES: FOR RECOMMENDATION PURPOSES

The following is to be completed by the Client and are to be supported in each case accompanied by a (i) Signed Appointment Letter; (ii) Signed and Stamped Reference (in the form issued to the tenderer)

WORK NAME 2:

Name of Client:

Name of the Contractor:

Tender Amount (VAT included)

Name of Project and Description:

Contract Duration:

RATE SERVICE PROVIDER ON THEIR OVERALL PERFORMANCE

DESCRIPTION	SCORE	TICK APPROPRIATE SCORING
Very Good	5	
Good	4	
Fair	3	
Poor	2	
Not Acceptable	0	

Any other remarks considered necessary to assist in the evaluation of the Service Provider?.....
.....
.....

Client Contact Person: Telephone:

I hereby declare that to the best of my knowledge, the information completed above is true and correct and I understand that I will be held responsible for any misrepresentation.

Client Signature:..... Date:.....

CLIENT STAMP

FORM 3. EXPERIENCE ON PREVIOUS WORK REFERENCES: FOR RECOMMENDATION PURPOSES

The following is to be completed by the Client and are to be supported in each case accompanied by a (i) Signed Appointment Letter; (ii) Signed and Stamped Reference (in the form issued to the tenderer)

WORK NAME 3:

Type of Project, e.g.: (electrical infrastructure, i.e. electrification, high mast lights, streetlights, etc.)

Name of Client:

Name of the Contractor:

Tender Amount (VAT included)

Name of Project and Description:

Contract Duration:

RATE SERVICE PROVIDER ON THEIR OVERALL PERFORMANCE

DESCRIPTION	SCORE	TICK APPROPRIATE SCORING
Very Good	5	
Good	4	
Fair	3	
Poor	2	
Not Acceptable	0	

Any other remarks considered necessary to assist in the evaluation of the Service Provider?.....
.....
.....

Client Contact Person: Telephone:

I hereby declare that to the best of my knowledge, the information completed above is true and correct and I understand that I will be held responsible for any misrepresentation.

Client Signature:..... Date:.....

CLIENT STAMP

T37

--

Employer

--

Witness 1

--

Witness 2

--

Broker

--

Witness 1

--

Witness 2

FORM 4. EXPERIENCE ON PREVIOUS WORK REFERENCES: FOR RECOMMENDATION PURPOSES

The following is to be completed by the Client and are to be supported in each case accompanied by a (i) Signed Appointment Letter; (ii) Signed and Stamped Reference (in the form issued to the tenderer)

WORK NAME 4:

Name of Client:.....

Name of the Contractor:

Tender Amount (VAT included)

Name of Project and Description:

Contract Duration:

RATE SERVICE PROVIDER ON THEIR OVERALL PERFORMANCE

DESCRIPTION	SCORE	TICK APPROPRIATE SCORING
Very Good	5	
Good	4	
Fair	3	
Poor	2	
Not Acceptable	0	

Any other remarks considered necessary to assist in the evaluation of the Service Provider?.....
.....
.....

Client Contact Person: Telephone:

I hereby declare that to the best of my knowledge, the information completed above is true and correct and I understand that I will be held responsible for any misrepresentation.

Client Signature:..... Date:.....

CLIENT STAMP

FORM 5. EXPERIENCE ON PREVIOUS WORK REFERENCES: FOR RECOMMENDATION PURPOSES

The following is to be completed by the Client and are to be supported in each case accompanied by a (i) Signed Appointment Letter; (ii) Signed and Stamped Reference (in the form issued to the tenderer)

WORK NAME 6:

Name of Client:.....

Name of the Contractor:

Tender Amount (VAT included)

Name of Project and Description:

Contract Duration:

RATE SERVICE PROVIDER ON THEIR OVERALL PERFORMANCE

DESCRIPTION	SCORE	TICK APPROPRIATE SCORING
Very Good	5	
Good	4	
Fair	3	
Poor	2	
Not Acceptable	0	

Any other remarks considered necessary to assist in the evaluation of the Service Provider?.....
.....
.....

Client Contact Person: Telephone:

I hereby declare that to the best of my knowledge, the information completed above is true and correct and I understand that I will be held responsible for any misrepresentation.

Client Signature:..... Date:.....

CLIENT STAMP

I. KEY PERSONNEL

The Tenderer must insert in the spaces provided below a list of the key personnel to be employed in the construction of the Works together with a resumé of their experience with particular reference to the construction of similar Works.

The Tenderer shall attach the curriculum vitae of the listed key personnel to the next page.

DESIGNATION	NAMES	PROJECT TYPE	VALUE OF WORK	YEAR COMPLETED

Attach additional pages if more space is required

SIGNATURE:
(of person authorised to sign on behalf of the Tenderer)

DATE:

DEVIATIONS AND QUALIFICATIONS

Should the Tenderer wish to make any deviation from or any qualification to the Special Conditions of Contract, Specifications, brokers fees or any professional body, or should he wish to qualify the tender in any way, he shall indicate the proposals clearly hereunder or alternatively on photocopies of the original tender documentation which shall be attached to this page.

[illegible]

Attach additional pages if more space is required

SIGNATURE:

DATE:

(of person authorised to sign on behalf of the Tenderer)

L. TENDERER'S BANKING DETAILS

The tenderer shall attach to this form a letter from the bank at which he declares he conducts his account. The contents of the bank's letter shall include the information requested in (a) to (e) below, and shall in addition state the credit rating that the bank accords the tenderer for the business envisaged by this tender. Failure to provide the required letter with the tender submission may render the tenderer's offer unresponsive in terms of subclause F.3.8 of the Conditions of Tender.

In addition to attaching the aforementioned letter from the bank, the tenderer shall also on this Form complete the banking details required in (a) to (e) below.

In the event that the tenderer is a joint venture enterprise, details for all the members of the joint venture shall similarly be provided and attached to this Form.

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

SIGNATURE:

DATE:

(of person authorised to sign on behalf of the Tenderer)

T44

Employer

Witness 1

Witness 2

Broker

Witness 1

Witness 2

M. MUNICIPAL ACCOUNT FOR THE BUSINESS AND DIRECTOR (S) NOT OWING FOR MORE THAN 90 DAYS OR MUNICIPAL ACCOUNT OF FROM PRIVATE PROVIDER OR STATEMENT OF ACCOUNT FROM THE LANDLORDS WITH VALID LEASE AGREEMENT

Submit the following either or;

1. Up to date Municipal Account not older than three (3) months and not over three (3) months in arrears for the Entity / Proof that acknowledgements or arrangements have been made to settle arrears / Affidavit stating why an up-to-date municipal account cannot be submitted/ statement of account from the landlords with a valid lease agreement or;
2. Up to date Municipal Account not older than three (3) months and not over three (3) months in arrears for the Director (s) or Member (s) / Proof that acknowledgements or arrangements have been made to settle arrears / Affidavit stating why an up-to-date municipal account cannot be submitted/ statement of account from the landlords with a valid lease agreement or;
3. Lease agreement of the offices where the company is situated at which is signed by both the Landlord and the lessee, accompanied by the Monthly statement of Account.

T45

Employer

Witness 1

Witness 2

Broker

Witness 1

Witness 2

N. PROOF OF REGISTRATION OF THE BIDDER

- Natural persons - certified copy of ID document/ passport
- Partnership - a copy of Partnership Agreement plus IDs of all partners
- Company- certified CM29
- Company - certified CM29 and certified copy of ID document/ passport
- Close Corporation- Certified copy of CK1 and/or CK2C and certified copy of ID document/ passport
- Trust- letter of appointment from the Master of the High Court of SA and deed of trust
- JV/Consortium- JV/Consortium Agreement plus CIPC and/or certified copies of ID documents of all JV/Consortium partners

O. CSD SUMMARY REPORT

The tenderer shall provide a printed copy of the Active Supplier Listing on the National Treasury Central Supplier Database. (www.treasury.gov.za). Tenderers who are not registered on the Central Supplier Database should attach proof of their application for registration (refer to Tender Data). In the case of a Joint Venture, a printed copy of the Active Supplier Listing must be provided for each member of the Joint Venture.

Name of Contractor:

Central Supplier Database Supplier Number:

- Affix Proof of the National Treasury Central Supplier Database to this page
- (Full CSD required, not summary)

T46

Employer

Witness 1

Witness 2

Broker

Witness 1

Witness 2

P. MBD 4: DECLARATION OF INTEREST

1. No bid will be accepted from persons in the service of the state¹.
2. Any person, having a kinship with persons in the service of the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid. In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons connected with or related to persons in service of the state, it is required that the bidder or their authorised representative declare their position in relation to the evaluating/adjudicating authority.
- 3 **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**

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

3.2 Identity Number:

3.3 Position occupied in the Company (director, trustee, hareholder²):.....

3.4 Company Registration Number:

3.5 Tax Reference Number:.....

3.6 VAT Registration Number:

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

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

3.8.1 If yes, furnish particulars.

.....

¹MSCM Regulations: "in the service of the state" means to be –

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

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

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

3.9.1 If yes, furnish particulars.....

.....

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

3.10.1 If yes, furnish particulars.

.....
.....

T47

Employer

Witness 1

Witness 2

Broker

Witness 1

Witness 2

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

3.11.1 If yes, furnish particulars

.....
.....

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

3.12.1 If yes, furnish particulars.

.....
.....

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

3.13.1 If yes, furnish particulars.

.....
.....

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

3.14.1 If yes, furnish particulars:

.....
.....

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

Full Name	Identity Number	State Employee Number

T48

Employer

Witness 1

Witness 2

Broker

Witness 1

Witness 2

.....
Signature

.....
Date

.....
Name of Bidder

.....
Capacity of Signatory

Q. MBD5: DECLARATION FOR PROCUREMENT ABOVE R10 MILLION (VAT INCLUDED)

For all procurement expected to exceed R10 million (VAT included), bidders must complete the following questionnaire:

1. Are you by law required to prepare annual financial statements for auditing? **YES/NO**

If yes, submit audited annual financial statements for the past three years or since the date of establishment if established during the past three years.

.....
.....

2. Do you have any outstanding undisputed commitments for Municipal services towards a municipality or any other service provider in respect of which payment is overdue for more than 30 days?

YES / NO

2.1 If no, this serves to certify that the bidder has no undisputed commitments for municipal services towards a municipality or other service provider in respect of which payment is overdue for more than 30 days.

2.2 If yes, provider particulars.

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

3. Has any contract been awarded to you by an organ of state during the past five years, including particulars of any material non-compliance or dispute concerning the execution of such contract?

YES / NO

3.1 If yes, furnish particulars

.....
.....

4. Will any portion of goods or services be sourced from outside the Republic, and, if so, what portion and whether any portion of payment from the municipality / municipal entity is expected to be transferred out of the Republic?

YES / NO

4.1 If yes, furnish the particulars

.....
.....

SIGNATURE:

DATE:

(of person authorised to sign on behalf of the Tenderer)

T50

Employer

Witness 1

Witness 2

Broker

Witness 1

Witness 2

R. MBD 6.1: PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

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

NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

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

1.2 To be completed by the organ of state

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

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

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

1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

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

1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

T51

Employer

Witness 1

Witness 2

Broker

Witness 1

Witness 2

2. DEFINITIONS

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

3. Functionality

4. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

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

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

80/20	or	90/10
$Ps = 80 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)$	or	$Ps = 90 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)$

Where

Ps = Points scored for price of tender under consideration
Pt = Price of tender under consideration
Pmin = Price of lowest acceptable tender

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

3.2.1. POINTS AWARDED FOR PRICE

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

80/20	or	90/10
$Ps = 80 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)$	or	$Ps = 90 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)$

Where

Ps = Points scored for price of tender under consideration
Pt = Price of tender under consideration
Pmax = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
 - (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,
- then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

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

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

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

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (90/10 system) (To be completed by the tenderer)
Points for 51% black owner	5		--	--
Points for 51% Women's Equity	5		--	--
Points for 51% owned Youth firm	5		--	--
Points for Locality (Within the jurisdiction of Northwest)	5		--	--
TOTAL EVALUATION POINTS SCORE FOR SPECIFIED GOALS	20			

DECLARATION WITH REGARD TO COMPANY/FIRM

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

4.4. Company registration number:

4.5. TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One-person business/sole propriety
- ☐ Close corporation
- ☐ Public Company
- ☐ Personal Liability Company
- ☐ (Pty) Limited
- ☐ Non-Profit Company
- ☐ State Owned Company

[TICK APPLICABLE BOX]

T53

Employer	Witness 1	Witness 2	Broker	Witness 1	Witness 2

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 - (a) disqualify the person from the tendering process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution, if deemed necessary.

..... SIGNATURE(S) OF TENDERER(S)	
SURNAME AND NAME:
DATE:
ADDRESS:

S. MBD 7.2: 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 bidding documents to **Moretele Local Municipality** in accordance with the requirements and task directives/proposals specifications stipulated in **Bid Number MLM/BTO/INS/2026-2028** at the price/s quoted. My 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 bid.
2. The following documents shall be deemed to form and be read and construed as part of this agreement:
 - (i) Bidding documents, viz
 - Invitation to bid;
 - 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 2011;
 - Declaration of interest;
 - Declaration of bidder's past SCM practices;
 - Certificate of Independent Bid Determination;
 - Special Conditions of Contract;
 - (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 bidding 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 bid.
6. I confirm that I am duly authorised to sign this contract.

NAME (PRINT)

CAPACITY

SIGNATURE

NAME OF FIRM

DATE

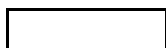
WITNESSES

1

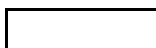
2

DATE:

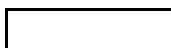
T55



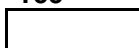
Employer



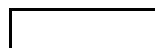
Witness 1



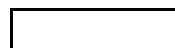
Witness 2



Broker



Witness 1



Witness 2

CONTRACT FORM - RENDERING OF SERVICES

PART 2 (TO BE FILLED IN BY THE PURCHASER)

1. I in my capacity as
accept your bid under reference number dated for the 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)	MINIMUM THRESHOLD FOR LOCAL PRODUCTION AND CONTENT (if applicable)

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

SIGNED AT ON

NAME (PRINT)

SIGNATURE

OFFICIAL STAMP

--

WITNESSES

1

2

DATE:

T56

--

Employer

--

Witness 1

--

Witness 2

--

Broker

--

Witness 1

--

Witness 2

T. 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:
 - a. abused the municipality's / municipal entity's supply chain management system or committed any improper conduct in relation to such system;
 - b. been convicted for fraud or corruption during the past five years;
 - c. willfully neglected, reneged on or failed to comply with any government, municipal or other public sector contract during the past five years; or
 - d. been listed in the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004).
- 4 **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**

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

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 <input type="checkbox"/>	No <input type="checkbox"/>
4.4.1	If so, furnish particulars:		
4.5	Was any contract between the bidder and the municipality / municipal entity or any other organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.7.1	If so, furnish particulars:		

CERTIFICATION

I, THE UNDERSIGNED (FULL NAME)
CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM 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

T58

Employer	Witness 1	Witness 2	Broker	Witness 1	Witness 2

U. MBD9: CERTIFICATE OF INDEPENDENT BID DETERMINATION

1. This Standard 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 per se prohibition meaning that it cannot be justified under any grounds.
3. Treasury Regulation 16A9 prescribes that accounting officers and accounting authorities must take all reasonable steps to prevent abuse of the supply chain management system and authorizes accounting officers and accounting authorities to:
 - a. disregard the bid of any bidder if that bidder, or any of its directors have abused the institution's supply chain management system and or committed fraud or any other improper conduct in relation to such system.
 - b. cancel a contract awarded to a supplier of goods and services if the supplier committed any corrupt or fraudulent act during the bidding process or the execution of that contract.
4. This MBD serves as a certificate of declaration that would be used by institutions to ensure that, when bids are considered, reasonable steps are taken to prevent any form of bid-rigging.
5. In order to give effect to the above, the attached Certificate of Bid Determination (MBD 9) must be completed and submitted with the bid:

CERTIFICATE OF INDEPENDENT BID DETERMINATION

I, the undersigned, in submitting the accompanying tender:

MLM/BTO/INSUR/2026-2028

Appointment of insurance broker for the short-term insurance portfolio for a period of 36 months

.....
(Tender Number and Description)

in response to the invitation for the tender made by:

Moretele Local Municipality

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

I certify, on behalf of:..... that:
(Name of Tenderer)

I have read and I understand the contents of this Certificate;
I understand that the accompanying tender will be disqualified if this Certificate is found not to be true and complete in every respect;
I am authorized by the tenderer to sign this Certificate, and to submit the accompanying tender, on behalf of the tenderer;
Each person whose signature appears on the accompanying tender has been authorized by the tenderer to determine the terms of and to sign the tender, on behalf of the tenderer.

T59

.....
Employer

.....
Witness 1

.....
Witness 2

.....
Broker

.....
Witness 1

.....
Witness 2

For the purposes of this Certificate and the accompanying tender, I understand that the word "competitor" shall include any individual or organization, other than the tenderer, whether or not affiliated with the tenderer, who:

- (a) has been requested to submit a tender in response to this tender invitation;
- (b) could potentially submit a tender in response to this tender invitation, based on their qualifications, abilities or experience; and
- (c) provides the same goods and services as the tenderer and/or is in the same line of business as the tenderer.

The tenderer has arrived at the accompanying tender independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium will not be construed as collusive tendering.

In particular, without limiting the generality of the preceding paragraphs above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:

- (a) prices;
 - (b) geographical area where the products or services will be rendered (market allocation);
 - (c) methods, factors or formulas used to calculate prices;
 - (d) the intention or decision to submit or not submit a tender;
 - (e) the submission of a tender which does not meet the specifications and conditions of the tender;
- or
- (f) tendering with the intention not to win the tender.

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 tender invitation relates.

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

I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to tenders and contracts, tenders 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 such tenderers 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

.....
Full name of Signatory

.....
Capacity of Signatory

T60

Employer

Witness 1

Witness 2

Broker

Witness 1

Witness 2