



**PROCUREMENT DOCUMENT**

**TENDER 113 / 2023**

**PROVISION OF AN ELECTRONIC WEB-BASED PERFORMANCE  
MANAGEMENT SYSTEM AND RELATED CONSULTING ACTIVITIES FOR A  
CONTRACT PERIOD ENDING 30 JUNE 2026.**

|                     |                     |                     |              |
|---------------------|---------------------|---------------------|--------------|
| <b>CLOSING DATE</b> | <b>17 JULY 2023</b> | <b>CLOSING TIME</b> | <b>13h30</b> |
|---------------------|---------------------|---------------------|--------------|

|  |          |          |          |          |  |  |  |  |  |  |
|--|----------|----------|----------|----------|--|--|--|--|--|--|
| <b>NAME OF BIDDER:</b>   |          |          |          |          |  |  |  |  |  |  |
| <b>ADDRESS OF BIDDER</b>   |          |          |          |          |  |  |  |  |  |  |
|  |          |          |          |          |  |  |  |  |  |  |
|  |          |          |          |          |  |  |  |  |  |  |
| <b>CSD SUPPLIER NUMBER:</b>  | <b>M</b> | <b>A</b> | <b>A</b> | <b>A</b> |  |  |  |  |  |  |
| <b>TENDERED AMOUNT<br/>(INCLUSIVE OF VAT)</b>  |          |          |          |          |  |  |  |  |  |  |
| <b>B-BEE STATUS LEVEL<br/>OF CONTRIBUTION</b>  |          |          |          |          |  |  |  |  |  |  |
| <b>LOCALITY</b><br>(Municipal Area / Province where<br>the business is located)        |          |          |          |          |  |  |  |  |  |  |
| <b>LOCALITY POINTS<br/>CLAIMED</b>   |          |          |          |          |  |  |  |  |  |  |
| <b>SIGNATURE OF PRINCE<br/>ALBERT MUNICIPALITY<br/>OFFICIALS AT TENDER<br/>OPENING</b> | 1.       |          |          |          |  |  |  |  |  |  |
|  | 2.       |          |          |          |  |  |  |  |  |  |

**Take note: B-BBEE certificates submitted with the bid document MUST be VALID ORIGINAL  
BBBEE CERTIFICATES or VALID CERTIFIED COPIES OF THE B-BBEE CERTIFICATES.**

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# PRINCE ALBERT MUNICIPALITY

## Tender Notice

**TENDER NUMBER:** 113/2023  
**TENDER DESCRIPTION:** PROVISION OF AN ELECTRONIC WEB-BASED PERFORMANCE MANAGEMENT SYSTEM AND RELATED CONSULTING ACTIVITIES FOR A CONTRACT PERIOD ENDING 30 JUNE 2026.  
**CLOSING DATE & TIME:** 17 JULY 2023 @ 13h30

Prince Albert Municipality hereby invites formal written quotations for the **PROVISION OF AN ELECTRONIC WEB-BASED PERFORMANCE MANAGEMENT SYSTEM AND RELATED CONSULTING ACTIVITIES FOR A CONTRACT PERIOD ENDING 30 JUNE 2026**. Tender documents are available at no charge from the Prince Albert Municipality Website at [www.pamun.gov.za](http://www.pamun.gov.za) (Website navigation is as follow: Procurement, Tenders available). **Tender documents will be available from 19 June 2023.**

Alternatively, a hard copy set of tender documents can be obtained from Ms. Christa Baadjies (Finance Division, Thusong Centre, Prince Albert, 6930) during office hours (Monday-Thursday, 07h30 to 16h00) and Friday (07h30 to 15h30) at a non-refundable cost of R 150.00 (VAT Included), payable in cash at the cashiers at the Prince Albert Municipality's Finance Division or via EFT deposit in favour of the Prince Albert Municipality, ABSA Bank, Branch code 632005, and Account number 2640560064. Reference to be used: T113/2023 and company name.

**Bids must remain valid for a period of ninety (90) days after the closing date of the bid.** Enquiries can be directed as follow:

| TYPE OF ENQUIRY                             | CONTACT PERSON            | CONTACT NUMBER | EMAIL ADDRESS  |
|---|---------------------------|----------------|--|
| Bidding procedures and tender documents     | Ms. Christa Baadjies      | 023 541 1748   | <a href="mailto:scm@pamun.gov.za">scm@pamun.gov.za</a>       |
| Technical / Specification related Enquiries | Mr. G. van der Westhuizen | 023 541 1036   | <a href="mailto:george@pamun.gov.za">george@pamun.gov.za</a> |

Bids must be submitted in sealed envelopes, clearly marked with the tender number and tender description. Bidders that fail to adhere to this requirement, will be disqualified at the bid opening. Late or unmarked bids will not be considered. **Telegraphic, telephonic, telex, facsimile, e-mail and late bids will not be accepted.**

Bids must be deposited in the tender box at the Finance Division (Thusong Centre, Adderley Street, Prince Albert, 6930). The tender box will be open as follow:

Monday to Thursday: 07h30 to 16h00  
Fridays: 07h30 to 15h30.

Bids will be opened in public immediately after the closing date at the Finance Division Boardroom (Finance Building, Thusong Centre).

**This bid is subject to functionality scoring.** Bidders must obtain the minimum functionality scoring as indicated in the tender document in order for the bid to be marked responsive. Bids that do not meet the minimum functionality scoring, will be regarded as non-responsive, and not be evaluated on price and preference points.

Bids will be evaluated according to the 80/20 preference points system. The bids are subject to the Council's Supply Chain Management Policy, the Municipal Preferential Procurement Policy, and the Preferential Procurement Regulations, 2022 (Government Gazette 47452, dated 04/11/2022). The General Conditions of Contract is also applicable. **Tenderers must be registered on the Central Supplier Database (CSD) if they wish to conduct business with the municipality.**

The preferential points system applied (80/20) in terms of the Preferential Procurement Policy are as follow:

|                                     |            |
|-------------------------------------|------------|
| PRICE                               | 80         |
| B-BBEE STATUS LEVEL OF CONTRIBUTION | 10         |
| LOCALITY                            | 10         |
| <b>TOTAL POINTS</b>                 | <b>100</b> |

The Municipality reserves the right to withdraw any invitation to bid and/or re-advertise or to reject any bid or to accept a part of it. The Municipality does not bind itself to accept the lowest bid or to award a contract to the Bidder scoring the highest number of points.

**NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE AS DEFINED IN THE MUNICIPAL SUPPLY CHAIN MANAGEMENT REGULATIONS (GOVERNMENT GAZETTE NO 40553 DATED 20 JANUARY 2017).**

**A.I. HENDRICKS**  
**Municipal Manager**  
**15 June 2023**

## TENDER CHECKLIST

**PLEASE ENSURE THAT THE FOLLOWING FORMS HAVE BEEN DULY COMPLETED AND SIGNED AND THAT ALL DOCUMENTS AS REQUESTED, ARE ATTACHED TO THE TENDER DOCUMENT:**

|   |     |  |    |  |
|---|-----|--|----|--|
| <b>Authority to Sign a Bid</b> – is the form duly completed and is a certified copy of the resolution attached?   | YES |  | NO |  |
| <b>MBD 2 (Tax Clearance)</b> – is an <b>ORIGINAL</b> and <b>VALID</b> Tax Status Pin attached?  | YES |  | NO |  |
| <b>Functionality scoring</b> – Is the form duly completed and signed? Supporting schedules, documents, proof of experience and other information required (if functionality is applicable).   | YES |  | NO |  |
| <b>Specifications</b> – Is the form duly completed?   | YES |  | NO |  |
| <b>MBD 3.1 (Pricing schedule)</b> – Is the form duly completed and signed?  | YES |  | NO |  |
| <b>MBD 4 (Declaration of Interest)</b> – Is the form duly completed and signed?   | YES |  | NO |  |
| <b>MBD 5 (Declaration for Procurement above R 10 million)</b> – Is the form duly completed and signed?  | YES |  | NO |  |
| <b>MBD 6.1 (Preference Points claim for purchases/services)</b> – Is the form duly completed and signed? Is a <b>CERTIFIED</b> copy of the <b>B-BBEE Certificate</b> or the <b>original B-BBEE Certificate</b> attached?  | YES |  | NO |  |
| <b>MBD 6.2 (Declaration for Local Production and Content)</b> – Is the form duly completed and signed? Are the relevant annexures (C, D & E) completed and submitted with this bid?   | YES |  | NO |  |
| <b>MBD 7.1 (Contract form – Purchase of Goods / Works)</b> – Is the form duly completed and signed?   | YES |  | NO |  |
| <b>MBD 7.2 (Contract form – Rendering of services)</b> – Is the form duly completed and signed?   | YES |  | NO |  |
| <b>MBD 7.3 (Contract form – Sale of Goods / Works)</b> – Is the form duly completed and signed?   | YES |  | NO |  |
| <b>MBD 8 (Declaration of Past Supply Chain Practices)</b> – Is the form duly completed and signed?  | YES |  | NO |  |
| <b>MBD 9 (Certificate of Independent Bid Determination)</b> – Is the form duly completed and signed?  | YES |  | NO |  |
| <b>MBD 15 (Certificate of Payment of Municipal Accounts)</b> – Is the form duly completed and signed? Are the <b>Identity numbers and certified copies, residential addresses and municipal account numbers</b> of <b>ALL</b> members, partners, directors, etc. provided on the form as requested? | YES |  | NO |  |
| Attached <b>Central Supplier Database (CSD) Report</b> ?  | YES |  | NO |  |

## CERTIFICATION

I, the undersigned (full name.....), certify that the information furnished on this checklist is true and correct.

Signed: .....

Date: .....

Name: .....

Position: .....

Tenderer: .....



| MBD 1 - INVITATION TO BID  |  |  |  |  |                          |  |  |            |           |
|--|--|--|--|--|--------------------------|--|--|------------|-----------|
| DETAILS OF TENDERER  |  |  |  |  |                          |  |  |            |           |
| <b>NAME OF BIDDER:</b>   |  |  |  |  |                          |  |  |            |           |
| <b>TRADING AS:</b><br>(if different from above):   |  |  |  |  |                          |  |  |            |           |
| <b>STREET ADDRESS:</b>   |  |  |  |  |                          |  |  |            |           |
| City / Town  |  |  |  |  | Code                     |  |  |            |           |
| <b>POSTAL ADDRESS:</b>   |  |  |  |  |                          |  |  |            |           |
| City / Town  |  |  |  |  | Code                     |  |  |            |           |
| <b>CONTACT PERSON:</b>   |  |  |  |  |                          |  |  |            |           |
| <b>ENTERPRISE REGISTRATION NUMBER</b>  |  |  |  |  | <b>CIDB CRS NUMBER:</b>  |  |  |            |           |
| <b>TCS PIN:</b>  |  |  |  |  | <b>FACSIMILE NUMBER:</b> |  |  |            |           |
| <b>EMAIL ADDRESS:</b>  |  |  |  |  |                          |  |  |            |           |
| <b>TELEPHONE NUMBER:</b>   |  |  |  |  | <b>CELLPHONE NUMBER:</b> |  |  |            |           |
| <b>HAS TAX COMPLIANCE STATUS PIN BEEN ATTACHED?</b>  |  |  |  |  |                          |  |  | <b>YES</b> | <b>NO</b> |
| <b>HAS AN ORIGINAL OR CERTIFIED COPY OF A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE BEEN SUBMITTED (MBD 6.1)?</b>   |  |  |  |  |                          |  |  | <b>YES</b> | <b>NO</b> |
| <b>HAS THE DELCARATION BEEN COMPLETED AND CURRENT, ORIGINAL OR CERTIFIED MUNICIPAL ACCOUNTS BEEN ATTACHED?</b>   |  |  |  |  |                          |  |  | <b>YES</b> | <b>NO</b> |
| DECLARATION  |  |  |  |  |                          |  |  |            |           |
| I am duly authorised to represent the tenderer for the purpose of this tender and hereby tender to supply all or any of the goods and/or render all or any of the services described in the attached document to the Prince Albert Municipality on the terms and conditions stipulated in this tender document and in accordance with the specification stipulated in the tender document. |  |  |  |  |                          |  |  |            |           |
| <b>NAME (PRINT):</b>   |  |  |  |  | <b>SIGNATURE:</b>        |  |  |            |           |
| <b>CAPACITY:</b>   |  |  |  |  | <b>DATE:</b>             |  |  |            |           |

## TERMS AND CONDITIONS FOR BIDDING

### 1. BID SUBMISSION

- (i) Bids must be delivered by the stipulated time to the correct address. Late bids will not be accepted for consideration.
- (ii) All bids must be submitted on the official forms provided–(not to be re-typed) or online
- (iii) This bid is subject to the Preferential Procurement Policy Framework Act and the Preferential Procurement Regulations, 2022, the Prince Albert Municipal Supply Chain Management Policy, the Preferential Procurement Policy, the General Conditions of Contract (GCC) and, if applicable, any other special conditions of contract.

### 2. TAX COMPLIANCE REQUIREMENTS

- (i) Bidders must ensure compliance with their tax obligations.
- (ii) Bidders are required to submit their unique personal identification number (pin) issued by SARS to enable the organ of state to view the taxpayer’s profile and tax status.
- (iii) Application for the tax compliance status (TCS) certificate or pin may also be made via E-filing. In order to use this provision, taxpayers will need to register with SARS, as E-filers through the website ( [www.sars.gov.za](http://www.sars.gov.za) ).
- (iv) Foreign suppliers must complete the pre-award questionnaire in part B:3.
- (v) Bidders may also submit a printed TCS certificate together with the bid.
- (vi) In bids where consortia / joint ventures / sub-contractors are involved; each party must submit a separate TCS certificate / Pin / CSD number.
- (vii) Where no TCS is available but the bidder is registered on the Central Supplier Database (CSD), a CSD Number must be provided.

### 3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS

|       |   |     |  |    |  |
|-------|---|-----|--|----|--|
| (i)   | Is the entity a resident of the Republic of South Africa (RSA)? | YES |  | NO |  |
| (ii)  | Does the entity have a branch in the RSA?                       | YES |  | NO |  |
| (iii) | Does the entity have a permanent establishment in the RSA?      | YES |  | NO |  |
| (iv)  | Does the entity have any source of income in the RSA?           | YES |  | NO |  |
| (v)   | Is the entity liable in the RSA for any form of taxation?       | YES |  | NO |  |

**NB: Failure to provide any of the above particulars may render the bid invalid. No bids will be considered from persons in the service of the state.**

Signature of bidder: .....

Capacity under which Bid is signed: .....

Date: .....

MUNISIPALITEIT  
VAN  
PRINS ALBERT



MUNICIPALITY  
OF  
PRINCE ALBERT

**PART A - ADMINISTRATIVE**  
REQUIREMENTS IN TERMS OF THE SUPPLY CHAIN MANAGEMENT  
POLICY



**AUTHORITY TO SIGN A BID**

**1.1 SOLE PROPRIETOR (SINGLE OWNER BUSINESS) AND NATURAL PERSON**

2.1.1) I, \_\_\_\_\_, the undersigned,  
hereby confirm that I am the sole owner of the business trading as  
\_\_\_\_\_ **OR**

2.1.2) I, \_\_\_\_\_, the  
undersigned, hereby confirm that I am submitting this tender in my capacity as  
natural person.

|                   |  |                  |  |
|-------------------|--|------------------|--|
| <b>SIGNATURE</b>  |  | <b>DATE</b>      |  |
| <b>PRINT NAME</b> |  |                  |  |
| <b>WITNESS 1</b>  |  | <b>WITNESS 2</b> |  |

**1.2 COMPANIES AND CLOSE CORPORATIONS**

2.2.1) **If a Bidder is a COMPANY, a certified copy of the resolution by the board of directors**, duly signed, authorising the person who signs this bid to do so, as well as to sign any contract resulting from this bid and any other documents and correspondence in connection with this bid and/or contract on behalf of the company **must be submitted with this bid**, that is, before the closing time and date of the bid

2.2.2) In the case of a **CLOSE CORPORATION (CC)** submitting a bid, **a resolution by its members**, authorizing a member or other official of the corporation to sign the documents on their behalf, **shall be included with the bid**.

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

|   |  |                  |           |
|---|--|------------------|-----------|
| <b>Date Resolution was taken</b>                            |  |                  |           |
| <b>Resolution signed by (name and surname)</b>              |  |                  |           |
| <b>Capacity</b>   |  |                  |           |
| <b>Name and surname of delegated Authorized Signatory</b>   |  |                  |           |
| <b>Capacity</b>   |  |                  |           |
| <b>Specimen Signature</b>                                   |  |                  |           |
| <b>FULL NAME AND SURNAME OF ALL DIRECTOR(S) / MEMBER(S)</b> |  |                  |           |
| <b>1.</b>   |  | <b>2.</b>        |           |
| <b>3.</b>   |  | <b>4.</b>        |           |
| <b>5.</b>   |  | <b>6.</b>        |           |
| <b>7.</b>   |  | <b>8.</b>        |           |
| <b>9.</b>   |  | <b>10.</b>       |           |
| <b>Is a CERTIFIED COPY of the resolution attached?</b>      |  | <b>YES</b>       | <b>NO</b> |
| <b>SIGNED ON BEHALF OF COMPANY / CC</b>                     |  | <b>DATE</b>      |           |
| <b>PRINT NAME</b>   |  |                  |           |
| <b>WITNESS 1</b>  |  | <b>WITNESS 2</b> |           |

**1.3 PARTNERSHIPS**

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

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

| FULL NAME OF PARTNER                   |  | SIGNATURE        |  |
|--|--|------------------|--|
|  |  |                  |  |
|  |  |                  |  |
|  |  |                  |  |
|  |  |                  |  |
| <b>SIGNED ON BEHALF OF PARTNERSHIP</b> |  | <b>DATE</b>      |  |
| <b>PRINT NAME</b>                      |  |                  |  |
| <b>WITNESS 1</b>                       |  | <b>WITNESS 1</b> |  |

**1.4 CONSORTIUM**

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

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

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

| FULL NAME OF CONSORTIUM MEMBER  | ROLE OF CONSORTIUM MEMBER | % PARTICIPATION | SIGNATURE |
|---------------------------------|---------------------------|-----------------|-----------|
|                                 |                           |                 |           |
|                                 |                           |                 |           |
|                                 |                           |                 |           |
|                                 |                           |                 |           |
| SIGNED ON BEHALF OF PARTNERSHIP |                           | DATE            |           |
| PRINT NAME                      |                           |                 |           |
| WITNESS 1                       |                           | WITNESS 2       |           |



**CERTIFICATE OF AUTHORITY FOR JOINT VENTURES**

**THIS RETURNABLE SCHEDULE IS TO BE COMPLETED BY JOINT VENTURES**

We, the undersigned, are submitting this tender offer in joint venture and hereby authorize Mr./Ms. \_\_\_\_\_, authorized signatory of the Company/Close Corporation/Partnership (name), \_\_\_\_\_, acting in the capacity of lead partner, to sign all documents in connection with the tender offer and any contract resulting from it on our behalf.

|  |  |                    |  |
|--|--|--------------------|--|
| <b>(a) NAME OF FIRM (LEAD PARTNER)</b> |  |                    |  |
| <b>ADDRESS</b>                         |  |                    |  |
| <b>SIGNATURE</b>                       |  |                    |  |
| <b>TEL.NO</b>                          |  | <b>DESIGNATION</b> |  |

|                         |  |                    |  |
|-------------------------|--|--------------------|--|
| <b>(b) NAME OF FIRM</b> |  |                    |  |
| <b>ADDRESS</b>          |  |                    |  |
| <b>SIGNATURE</b>        |  |                    |  |
| <b>TEL.NO</b>           |  | <b>DESIGNATION</b> |  |

|                         |  |                    |  |
|-------------------------|--|--------------------|--|
| <b>(c) NAME OF FIRM</b> |  |                    |  |
| <b>ADDRESS</b>          |  |                    |  |
| <b>SIGNATURE</b>        |  |                    |  |
| <b>TEL.NO</b>           |  | <b>DESIGNATION</b> |  |

**NOTE: A copy of the Joint Venture Agreement showing clearly the percentage contribution of each partner to the Joint Venture, shall be appended to this Schedule.**



**GENERAL CONDITIONS OF CONTRACT**

**1. DEFINITIONS**

The following terms shall be interpreted as indicated:

|  |   |
|--|---|
| <b>“Closing time”</b>                                  | means the date and hour specified in the bidding documents for the receipt of bids.   |
| <b>“Contract”</b>                                      | means the written agreement entered into between the purchaser and the supplier, as recorded in the contract form signed by the parties, including all attachments and appendices thereto and all documents incorporated by reference therein   |
| <b>“Contract price”</b>                                | means the price payable to the supplier under the contract for the full and proper performance of his contractual obligations.  |
| <b>“Corrupt practice”</b>                              | means the offering, giving, receiving, or soliciting of any thing of value to influence the action of a public official in the procurement process or in contract execution.  |
| <b>"Countervailing duties"</b>                         | are imposed in cases where an enterprise abroad is subsidized by its government and encouraged to market its products internationally   |
| <b>“Country of origin”</b>                             | means the place where the goods were mined, grown or produced or from which the services are supplied. Goods are produced when, through manufacturing, processing or substantial and major assembly of components, a commercially recognized new product results that is substantially different in basic characteristics or in purpose or utility from its components. |
| <b>“Day”</b>   | means calendar day.   |
| <b>“Delivery”</b>                                      | means delivery in compliance of the conditions of the contract or order.  |
| <b>“Delivery ex stock”</b>                             | means immediate delivery directly from stock actually on hand   |
| <b>“Delivery into consignees store or to his site”</b> | means delivered and unloaded in the specified store or depot or on the specified site in compliance with the conditions of the contract or order, the supplier bearing all risks and charges involved until the supplies are so delivered and a valid receipt is obtained.  |
| <b>"Dumping"</b>                                       | occurs when a private enterprise abroad market its goods on own initiative in the RSA at lower prices than that of the country of origin and which have the potential to harm the local industries in the RSA.  |
| <b>”Force majeure”</b>                                 | means an event beyond the control of the supplier and not involving the supplier’s fault or negligence and not foreseeable. Such events may include, but is not restricted to, acts of the purchaser in its sovereign capacity, wars or revolutions, fires, floods, epidemics, quarantine restrictions and freight embargoes.   |

|                                  |  |
|----------------------------------|--|
| <b>“Fraudulent practice”</b>     | means a misrepresentation of facts in order to influence a procurement process or the execution of a contract to the detriment of any bidder, and includes collusive practice among bidders (prior to or after bid submission) designed to establish bid prices at artificial non-competitive levels and to deprive the bidder of the benefits of free and open competition.   |
| <b>“GCC”</b>                     | means the General Conditions of Contract.  |
| <b>“Goods”</b>                   | means all of the equipment, machinery, and/or other materials that the supplier is required to supply to the purchaser under the contract  |
| <b>“Imported content”</b>        | means that portion of the bidding price represented by the cost of components, parts or direct importation costs such as landing costs, dock dues, import duty, sales duty or other similar tax or duty at the South African place of entry as well as transportation and handling charges to the factory in the Republic where the supplies covered by the bid will be charges to the factory in the Republic where the supplies covered by the bid will be manufactured. |
| <b>“Local content”</b>           | means that portion of the bidding price which is not included in the imported content provided that local manufacture does take place.   |
| <b>“Manufacture”</b>             | means the production of products in a factory using labour, materials, components and machinery and includes other related value-adding activities.  |
| <b>“Order”</b>                   | means an official written order issued for the supply of goods or works or the rendering of a service.   |
| <b>“Project site”</b>            | where applicable, means the place indicated in bidding documents.  |
| <b>“Purchaser”</b>               | means the organization purchasing the goods.   |
| <b>“Republic”</b>                | means the Republic of South Africa.  |
| <b>“SCC”</b>                     | means the Special Conditions of Contract.  |
| <b>“Services”</b>                | means that functional services ancillary to the supply of the goods, such as transportation and any other incidental services, such as installation, commissioning, provision of technical assistance, training, catering, gardening, security, maintenance and other such obligations of the supplier covered under the contract.   |
| <b>“Supplier”</b>                | means the successful bidder who is awarded the contract to maintain and administer the required and specified service(s) to the State.   |
| <b>“Tort”</b>                    | means in breach of contract.   |
| <b>“Turnkey”</b>                 | means a procurement process where one service provider assumes total responsibility for all aspects of the project and delivers the full end product / service required by the contract  |
| <b>“Written” or “in writing”</b> | means handwritten in ink or any form of electronic or mechanical writing.  |

## **2. APPLICATION**

- 2.1) These general conditions are applicable to all bids, contracts and orders including bids for functional and professional services, sales, hiring, letting and the granting or acquiring of rights, but excluding immovable property, unless otherwise indicated in the bidding documents.
- 2.2) Where applicable, special conditions of contract are also laid down to cover specific supplies, services or works.
- 2.3) Where such special conditions of contract are in conflict with these general conditions, the special conditions shall apply.

## **3. GENERAL**

- 3.1) Unless otherwise indicated in the bidding documents, the purchaser shall not be liable for any expense incurred in the preparation and submission of a bid. Where applicable a non-refundable fee for documents may be charged.
- 3.2) Invitations to bid are usually published in locally distributed news media and on the municipality / municipal entity website.

## **4. STANDARDS**

- 4.1) The goods supplied shall conform to the standards mentioned in the bidding documents and specifications.

## **5. USE OF CONTRACT DOCUMENTS AND INFORMATION; INSPECTION**

- 5.1) The supplier shall not, without the purchaser's prior written consent, disclose the contract, or any provision thereof, or any specification, plan, drawing, pattern, sample, or information furnished by or on behalf of the purchaser in connection therewith, to any person other than a person employed by the supplier in the performance of the contract. Disclosure to any such employed person shall be made in confidence and shall extend only as far as may be necessary for purposes of such performance.
- 5.2) The supplier shall not, without the purchaser's prior written consent, make use of any document or information mentioned in GCC clause 5.1 except for purposes of performing the contract.
- 5.3) Any document, other than the contract itself mentioned in GCC clause 5.1 shall remain the property of the purchaser and shall be returned (all copies) to the purchaser on completion of the supplier's performance under the contract if so required by the purchaser.

- 5.4) The supplier shall permit the purchaser to inspect the supplier's records relating to the performance of the supplier and to have them audited by auditors appointed by the purchaser, if so required by the purchaser.

## **6. PATENT RIGHTS**

- 6.1) The supplier shall indemnify the purchaser against all third-party claims of infringement of patent, trademark, or industrial design rights arising from use of the goods or any part thereof by the purchaser.
- 6.2) When a supplier developed documentation / projects for the municipality / municipal entity, the intellectual, copy and patent rights or ownership of such documents or projects will vest in the municipality / municipal entity.

## **7. PERFORMANCE SECURITY**

- 7.1) Within thirty (30) days of receipt of the notification of contract award, the successful bidder shall furnish to the purchaser the performance security of the amount specified in SCC.
- 7.2) The proceeds of the performance security shall be payable to the purchaser as compensation for any loss resulting from the supplier's failure to complete his obligations under the contract.
- 7.3) The performance security shall be denominated in the currency of the contract or in a freely convertible currency acceptable to the purchaser and shall be in one of the following forms:
- 7.3.1) bank guarantee or an irrevocable letter of credit issued by a reputable bank located in the purchaser's country or abroad, acceptable to the purchaser, in the form provided in the bidding documents or another form acceptable to the purchaser; or
- 7.3.2) a cashier's or certified cheque
- 7.4) The performance security will be discharged by the purchaser and returned to the supplier not later than thirty (30) days following the date of completion of the supplier's performance obligations under the contract, including any warranty obligations, unless otherwise specified.

## **8. INSPECTIONS, TESTS AND ANALYSES**

- 8.1) All pre-bidding testing will be for the account of the bidder.
- 8.2) If it is a bid condition that supplies to be produced or services to be rendered should at any stage during production or execution or on completion be subject to inspections tests and analysis, the bidder or contractor's premises shall be

open, at all reasonable hours, for inspection by a representative of the purchaser or an organization acting on behalf of the purchaser.

- 8.3) If there are no inspection requirements indicated in the bidding documents and no mention is made in the contract, but during the contract period it is decided that inspections shall be carried out, the purchaser shall itself make the necessary arrangements, including payment arrangements with the testing authority concerned.
- 8.4) If the inspections, tests and analyses referred to in clauses 8.2 and 8.3 show the goods to be in accordance with the contract requirements, the cost of the inspections, tests and analyses shall be defrayed by the purchaser.
- 8.5) Where the goods or services referred to in clauses 8.2 and 8.3 do not comply with the contract requirements, irrespective of whether such goods or services are accepted or not, the cost in connection with these inspections, tests or analyses shall be defrayed by the supplier.
- 8.6) Supplies and services which are referred to in clauses 8.2 and 8.3 and which do not comply with the contract requirements may be rejected.
- 8.7) Any contract goods may on or after delivery be inspected, tested or analysed and may be rejected if found not to comply with the requirements of the contract. Such rejected goods shall be held at the cost and risk of the supplier who shall, when called upon, remove them immediately at his own cost and forthwith substitute them with goods which do comply with the requirements of the contract. Failing such removal, the rejected goods shall be returned at the suppliers cost and risk. Should the supplier fail to provide the substitute goods forthwith, the purchaser may, without giving the supplier further opportunity to substitute the rejected goods, purchase such goods as may be necessary at the expense of the supplier.
- 8.8) The provisions of clauses 8.4 to 8.7 shall not prejudice the right of the purchaser to cancel the contract on account of a breach of the conditions thereof, or to act in terms of Clause 22 of GCC.

## **9. PACKING**

- 9.1) The supplier shall provide such packing of the goods as is required to prevent their damage or deterioration during transit to their final destination, as indicated in the contract. The packing shall be sufficient to withstand, without limitation, rough handling during transit and exposure to extreme temperatures, salt and precipitation during transit, and open storage. Packing, case size and weights shall take into consideration, where appropriate, the remoteness of the goods' final destination and the absence of heavy handling facilities at all points in transit.

- 9.2) The packing, marking, and documentation within and outside the packages shall comply strictly with such special requirements as shall be expressly provided for in the contract, including additional requirements, and in any subsequent instructions ordered by the purchaser.

**10. DELIVERY**

- 10.1) Delivery of the goods shall be made by the supplier in accordance with the documents and terms specified in the contract. The details of shipping and/or other documents to be furnished by the supplier are specified.

**11. INSURANCE**

- 11.1) The goods supplied under the contract shall be fully insured in a freely convertible currency against loss or damage incidental to manufacture or acquisition, transportation, storage and delivery in the manner specified.

**12. TRANSPORTATION**

- 12.1) Should a price other than an all-inclusive delivered price be required, this shall be specified.

**13. INCIDENTAL**

- 13.1) The supplier may be required to provide any or all of the following services, including additional services, if any:

13.1.1) performance or supervision of on-site assembly and/or commissioning of the supplied goods;

13.1.2) furnishing of tools required for assembly and/or maintenance of the supplied goods;

13.1.3) furnishing of a detailed operations and maintenance manual for each appropriate unit of the supplied goods;

13.1.4) performance or supervision or maintenance and/or repair of the supplied goods, for a period of time agreed by the parties, provided that this service shall not relieve the supplier of any warranty obligations under this contract; and

13.1.5) training of the purchaser's personnel, at the supplier's plant and/or on-site, in assembly, start-up, operation, maintenance, and/or repair of the supplied goods.

- 13.2) Prices charged by the supplier for incidental services, if not included in the contract price for the goods, shall be agreed upon in advance by the parties and

shall not exceed the prevailing rates charged to other parties by the supplier for similar services.

#### **14. SPARE PARTS**

**14.1)** As specified, the supplier may be required to provide any or all of the following materials, notifications, and information pertaining to spare parts manufactured or distributed by the supplier:

14.1.1) such spare parts as the purchaser may elect to purchase from the supplier, provided that this election shall not relieve the supplier of any warranty obligations under the contract; and;

14.1.2) in the event of termination of production of the spare parts:

14.1.2.1) advance notification to the purchaser of the pending termination, in sufficient time to permit the purchaser to procure needed requirements; and

14.1.2.2) following such termination, furnishing at no cost to the purchaser, the blueprints, drawings, and specifications of the spare parts, if requested.

#### **15. WARRANTY**

15.1) The supplier warrants that the goods supplied under the contract are new, unused, of the most recent or current models, and that they incorporate all recent improvements in design and materials unless provided otherwise in the contract. The supplier further warrants that all goods supplied under this contract shall have no defect, arising from design, materials, or workmanship (except when the design and/or material is required by the purchaser's specifications) or from any act or omission of the supplier, that may develop under normal use of the supplied goods in the conditions prevailing in the country of final destination.

15.2) This warranty shall remain valid for twelve (12) months after the goods, or any portion thereof as the case may be, have been delivered to and accepted at the final destination indicated in the contract, or for eighteen (18) months after the date of shipment from the port or place of loading in the source country, whichever period concludes earlier, unless specified otherwise in SCC.

15.3) The purchaser shall promptly notify the supplier in writing of any claims arising under this warranty.

15.4) Upon receipt of such notice, the supplier shall, within the period specified in SCC and with all reasonable speed, repair or replace the defective goods or parts thereof, without costs to the purchaser.

15.5) If the supplier, having been notified, fails to remedy the defect(s) within the period specified, the purchaser may proceed to take such remedial action as

may be necessary, at the supplier's risk and expense and without prejudice to any other rights which the purchaser may have against the supplier under the contract.

**16. PAYMENT**

- 16.1) The method and conditions of payment to be made to the supplier under this contract shall be specified.
- 16.2) The supplier shall furnish the purchaser with an invoice accompanied by a copy of the delivery note and upon fulfilment of other obligations stipulated in the contract.
- 16.3) Payments shall be made by the purchaser no later than thirty (30) days after submission of an invoice, statement or claim by the supplier.
- 16.4) Payment will be made in Rand unless otherwise stipulated.

**17. PRICES**

- 17.1) Prices charged by the supplier for goods delivered and services performed under the contract shall not vary from the prices quoted by the supplier in his bid, with the exception of any price adjustments authorized or in the purchaser's request for bid validity extension, as the case may be.

**18. VARIATION ORDERS**

- 18.1) In cases where the estimated value of the envisaged changes in purchase does not vary more than 15% of the total value of the original contract, the contractor may be instructed to deliver the goods or render the services as such. In cases of measurable quantities, the contractor may be approached to reduce the unit price and such offers, may be accepted provided that there is no escalation in price.

**19. ASSIGNMENT**

- 19.1) The supplier shall not assign, in whole or in part, its obligations to perform under the contract, except with the purchaser's prior written consent.

**20. SUBCONTRACTS**

- 20.1) The supplier shall notify the purchaser in writing of all subcontracts awarded under this contract, if not already specified in the bid. Such notification, in the original bid or later, shall not relieve the supplier from any liability or obligation under the contract.

## **21. DELAYS IN THE SUPPLIER'S PERFORMANCE**

- 21.1) Delivery of the goods and performance of services shall be made by the supplier in accordance with the time schedule prescribed by the purchaser in the contract.
- 21.2) If at any time during performance of the contract, the supplier or its subcontractor(s) should encounter conditions impeding timely delivery of the goods and performance of services, the supplier shall promptly notify the purchaser in writing of the fact of the delay, its likely duration and its cause(s). As soon as practicable after receipt of the supplier's notice, the purchaser shall evaluate the situation and may at his discretion extend the supplier's time for performance, with or without the imposition of penalties, in which case the extension shall be ratified by the parties by amendment of contract.
- 21.3) The right is reserved to procure outside of the contract small quantities or to have minor essential services executed if an emergency arises, the supplier's point of supply is not situated at or near the place where the supplies are required, or the supplier's services are not readily available.
- 21.4) Except as provided under GCC Clause 25, a delay by the supplier in the performance of its delivery obligations shall render the supplier liable to the imposition of penalties, pursuant to GCC Clause 22, unless an extension of time is agreed upon pursuant to GCC Clause 22 without the application of penalties.
- 21.5) Upon any delay beyond the delivery period in the case of a supplies contract, the purchaser shall, without cancelling the contract, be entitled to purchase supplies of a similar quality and up to the same quantity in substitution of the goods not supplied in conformity with the contract and to return any goods delivered later at the supplier's expense and risk, or to cancel the contract and buy such goods as may be required to complete the contract and without prejudice to his other rights, be entitled to claim damages from the supplier.

## **22. PENALTIES**

- 22.1) Subject to GCC Clause 25, if the supplier fails to deliver any or all of the goods or to perform the services within the period(s) specified in the contract, the purchaser shall, without prejudice to its other remedies under the contract, deduct from the contract price, as a penalty, a sum calculated on the delivered price of the delayed goods or unperformed services using the current prime interest rate calculated for each day of the delay until actual delivery or performance. The purchaser may also consider termination of the contract pursuant to GCC Clause 23.

## **23. TERMINATION FOR DEFAULT**

- 23.1) The purchaser, without prejudice to any other remedy for breach of contract, by written notice of default sent to the supplier, may terminate this contract in whole or in part:
- 23.1.1) if the supplier fails to deliver any or all of the goods within the period(s) specified in the contract, or within any extension thereof granted by the purchaser pursuant to GCC Clause 21.2;
  - 23.1.2) if the Supplier fails to perform any other obligation(s) under the contract;  
or
  - 23.1.3) if the supplier, in the judgment of the purchaser, has engaged in corrupt or fraudulent practices in competing for or in executing the contract.
- 23.2) In the event the purchaser terminates the contract in whole or in part, the purchaser may procure, upon such terms and in such manner as it deems appropriate, goods, works or services similar to those undelivered, and the supplier shall be liable to the purchaser for any excess costs for such similar goods, works or services. However, the supplier shall continue performance of the contract to the extent not terminated.
- 23.3) Where the purchaser terminates the contract in whole or in part, the purchaser may decide to impose a restriction penalty on the supplier by prohibiting such supplier from doing business with the public sector for a period not exceeding 10 years.
- 23.4) If a purchaser intends imposing a restriction on a supplier or any person associated with the supplier, the supplier will be allowed a time period of not more than fourteen (14) days to provide reasons why the envisaged restriction should not be imposed. Should the supplier fail to respond within the stipulated fourteen (14) days the purchaser may regard the supplier as having no objection and proceed with the restriction.
- 23.5) Any restriction imposed on any person by the purchaser will, at the discretion of the purchaser, also be applicable to any other enterprise or any partner, manager, director or other person who wholly or partly exercises or exercised or may exercise control over the enterprise of the first-mentioned person, and with which enterprise or person the first-mentioned person, is or was in the opinion of the purchase actively associated.
- 23.6) If a restriction is imposed, the purchaser must, within five (5) working days of such imposition, furnish the National Treasury, with the following information:
- 23.6.1) the name and address of the supplier and / or person restricted by the purchaser;

- 23.6.2) the date of commencement of the restriction
- 23.6.3) the period of restriction; and
- 23.6.4) the reasons for the restriction.

These details will be loaded in the National Treasury's central database of suppliers or persons prohibited from doing business with the public sector.

- 23.7) If a court of law convicts a person of an offence as contemplated in sections 12 or 13 of the Prevention and Combating of Corrupt Activities Act, No. 12 of 2004, the court may also rule that such person's name be endorsed on the Register for Tender Defaulters. When a person's name has been endorsed on the Register, the person will be prohibited from doing business with the public sector for a period not less than five years and not more than 10 years. The National Treasury is empowered to determine the period of restriction and each case will be dealt with on its own merits. According to section 32 of the Act the Register must be open to the public. The Register can be perused on the National Treasury website.

#### **24. ANTI-DUMPING AND COUNTERVAILING DUTIES AND RIGHTS**

- 24.1) When, after the date of bid, provisional payments are required, or antidumping or countervailing duties are imposed, or the amount of a provisional payment or anti-dumping or countervailing right is increased in respect of any dumped or subsidized import, the State is not liable for any amount so required or imposed, or for the amount of any such increase. When, after the said date, such a provisional payment is no longer required or any such anti-dumping or countervailing right is abolished, or where the amount of such provisional payment or any such right is reduced, any such favourable difference shall on demand be paid forthwith by the contractor to the State or the State may deduct such amounts from moneys (if any) which may otherwise be due to the contractor in regard to supplies or services which he delivered or rendered, or is to deliver or render in terms of the contract or any other contract or any other amount which may be due to him.

#### **25. FORCE MAJEURE**

- 25.1) Notwithstanding the provisions of GCC Clauses 22 and 23, the supplier shall not be liable for forfeiture of its performance security, damages, or termination for default if and to the extent that his delay in performance or other failure to

perform his obligations under the contract is the result of an event of force majeure.

- 25.2) If a force majeure situation arises, the supplier shall promptly notify the purchaser in writing of such condition and the cause thereof. Unless otherwise directed by the purchaser in writing, the supplier shall continue to perform its obligations under the contract as far as is reasonably practical, and shall seek all reasonable alternative means for performance not prevented by the force majeure event.

## **26. TERMINATION FOR INSOLVENCY**

- 26.1) The purchaser may at any time terminate the contract by giving written notice to the supplier if the supplier becomes bankrupt or otherwise insolvent. In this event, termination will be without compensation to the supplier, provided that such termination will not prejudice or affect any right of action or remedy which has accrued or will accrue thereafter to the purchaser.

## **27. SETTLEMENT OF DISPUTES**

- 27.1) If any dispute or difference of any kind whatsoever arises between the purchaser and the supplier in connection with or arising out of the contract, the parties shall make every effort to resolve amicably such dispute or difference by mutual consultation.
- 27.2) If, after thirty (30) days, the parties have failed to resolve their dispute or difference by such mutual consultation, then either the purchaser or the supplier may give notice to the other party of his intention to commence with mediation. No mediation in respect of this matter may be commenced unless such notice is given to the other party.
- 27.3) Should it not be possible to settle a dispute by means of mediation, it may be settled in a South African court of law.
- 27.4) Notwithstanding any reference to mediation and/or court proceedings herein,  
27.4.1) the parties shall continue to perform their respective obligations under the contract unless they otherwise agree; and  
27.4.2) the purchaser shall pay the supplier any monies due for goods delivered and / or services rendered according to the prescripts of the contract.

## **28. LIMITATION OF LIABILITY**

28.1) Except in cases of criminal negligence or wilful misconduct, and in the case of infringement pursuant to Clause 6;

28.1.1) the supplier shall not be liable to the purchaser, whether in contract, tort, or otherwise, for any indirect or consequential loss or damage, loss of use, loss of production, or loss of profits or interest costs, provided that this exclusion shall not apply to any obligation of the supplier to pay penalties and/or damages to the purchaser; and

28.1.2) the aggregate liability of the supplier to the purchaser, whether under the contract, in tort or otherwise, shall not exceed the total contract price, provided that this limitation shall not apply to the cost of repairing or replacing defective equipment.

## **29. GOVERNING LANGUAGE**

29.1) The contract shall be written in English. All correspondence and other documents pertaining to the contract that is exchanged by the parties shall also be written in English.

## **30. APPLICABLE LAW**

30.1) The contract shall be interpreted in accordance with South African laws, unless otherwise specified.

## **31. NOTICES**

31.1) Every written acceptance of a bid shall be posted to the supplier concerned by registered or certified mail and any other notice to him shall be posted by ordinary mail to the address furnished in his bid or to the address notified later by him in writing and such posting shall be deemed to be proper service of such notice

31.2) The time mentioned in the contract documents for performing any act after such aforesaid notice has been given, shall be reckoned from the date of posting of such notice.

## **32. TAXES AND DUTIES**

32.1) A foreign supplier shall be entirely responsible for all taxes, stamp duties, license fees, and other such levies imposed outside the purchaser's country.

- 32.2) A local supplier shall be entirely responsible for all taxes, duties, license fees, etc., incurred until delivery of the contracted goods to the purchaser.
- 32.3) No contract shall be concluded with any bidder whose tax matters are not in order. Prior to the award of a bid SARS must have certified that the tax matters of the preferred bidder are in order.
- 32.4) No contract shall be concluded with any bidder whose municipal rates and taxes and municipal services charges are in arrears.

### **33. TRANSFER OF CONTRACTS**

- 33.1) The contractor shall not abandon, transfer, cede, assign or sublet a contract or part thereof without the written permission of the purchaser.

### **34. AMENDMENT OF CONTRACTS**

- 34.1) No agreement to amend or vary a contract or order or the conditions, stipulations or provisions thereof shall be valid and of any force unless such agreement to amend or vary is entered into in writing and signed by the contracting parties. Any waiver of the requirement that the agreement to amend or vary shall be in writing, shall also be in writing.

### **(a) PROHIBITION OF RESTRICTIVE PRACTICES**

- 35.1) In terms of section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, an agreement between, or concerted practice by, firms, or a decision by an association of firms, is prohibited if it is between parties in a horizontal relationship and if a bidder(s) is / are or a contractor(s) was / were involved in collusive bidding.
- 35.2) If a bidder(s) or contractor(s) based on reasonable grounds or evidence obtained by the purchaser has / have engaged in the restrictive practice referred to above, the purchaser may refer the matter to the Competition Commission for investigation and possible imposition of administrative penalties as contemplated in section 59 of the Competition Act No 89 Of 1998.
- 35.3) If a bidder(s) or contractor(s) has / have been found guilty by the Competition Commission of the restrictive practice referred to above, the purchaser may, in addition and without prejudice to any other remedy provided for, invalidate the bid(s) for such item(s) offered, and / or terminate the contract in whole or part, and / or restrict the bidder(s) or contractor(s) from conducting business with the public sector for a period not exceeding ten (10) years and / or claim damages from the bidder(s) or contractor(s) concerned.

## GENERAL CONDITIONS OF TENDER

1. Sealed tenders, with the tender number and tender description clearly endorsed on the envelope, must be deposited in the tender box at the offices of the Prince Albert Municipality (Financial Services Division), Thusong Service Centre, Adderley Street, Prince Albert, 6930
2. **PLEASE NOTE:**
  - 2.1) Tenders that are deposited in the incorrect box will not be considered.
  - 2.2) Mailed, telegraphic or faxed tenders will not be accepted.
  - 2.3) **Documents may only be completed in non-erasable ink and handwritten. Re-typed documents will be marked as non-responsive.**
  - 2.4) The use of correction fluid/tape is not allowed.
    - 2.4.1) In the event of a mistake having been made, it shall be crossed out in ink and be accompanied by an initial at each and every alteration.
    - 2.4.2) Alterations or deletions not signed by the Tenderer may render the tender invalid.
  - 2.5) All bids must be submitted in writing on the official forms supplied (not to be re-typed)
  - 2.6) All prices shall be quoted in South African currency and be **INCLUSIVE of VAT.**
3. Any Tender received after the appointed time for the closing of Tenders shall not be considered but shall be filed unopened with the other Tenders received or may be returned to the Tenderer at his request.
4. Tenders may not be telefaxed to the Municipality and therefore any tenders received by fax will not be considered.
5. Tenders shall be opened in public at the Financial Services Boardroom immediately after the closing time for the receipt of tenders. Tenderers are encouraged to attend these openings.

## **6. EVALUATION OF BID**

- 6.1) This bid will be evaluated and adjudicated according to the following criteria:
- 6.1.1) Adherence to the relevant specifications
  - 6.1.2) Value for money
  - 6.1.3) Capability to execute the contract
  - 6.1.4) PPPFA & associated regulations

## **7. SERVICE LEVEL AGREEMENT**

The award of the tender might be subject to the signing of a Service Level Agreement (SLA) between the successful bidder and Prince Albert Municipality. Further details will be explained in the tender specifications.

## **8. CENTRALISED SUPPLIER DATABASE**

- 9.1) No Bids will be awarded to a bidder who is not registered on the Centralised Supplier Database (CSD).
- 9.2) The CSD supplier number starting with (MAAA) number is automatically generated by the Central Supplier Database System after successful registration and validation of a prospective service provider.
- 9.3) This is a mandatory requirement, as referred to in regulation 14(1) (b) of the Municipal Supply Chain Management Regulations, as part of the listing criteria for accrediting a prospective service provider.
- 9.4) Prospective suppliers should self – register on the CSD website at [www.csd.gov.za](http://www.csd.gov.za).
- 9.5) Registration on the CSD will be compulsory in order to conduct business with the Prince Albert Municipality.
- 9.6) Registration on CSD can be done by contacting Ms. Christa Baadjies at 023 541 1748 or via email ( [scm@pamun.gov.za](mailto:scm@pamun.gov.za) )

## MBD 2 – TAX CLEARANCE CERTIFICATE REQUIREMENTS

It is a condition of tender that the taxes of the successful bidder must be in order, or that satisfactory arrangements have been made with South African Revenue Service (SARS) to meet the bidder's tax obligations, before an award may be considered.

1. The Tax Clearance Certificate/ Tax Compliance Status (TCS) Pin/ Centralised Suppliers Database (CSD) Registration Number **must be submitted together with the bid.** Failure to submit a Tax Clearance Certificate/TCS Pin/CSD registration number may result in the invalidation of the bid.
  
2. Tax Compliance Status (TCS) Pin as of 18 April 2016
  - 2.1) In terms of the new Tax Compliance Status System implemented by SARS on 18 April 2016, taxpayers are now able to issue the municipality with a TCS Pin which will be used to verify a bidder's tax status online via SARS E-filing.
  - 2.2) This option will be used to verify the status of the service provider (which should be active or compliant) and will determine if the offer will be further evaluated or omitted, even if the bidder only submitted a TCC as per point 1 above.
  - 2.3) Service provider's status which is found inactive or non-compliant their offers will be omitted.
  - 2.4) Bidders in possession of a valid Tax Status Pin must issue the municipality with the following:

|  |  |
|--|--|
| <b>Tax Reference Number (IT / VAT / PAYE</b> |  |
| <b>Tax Compliance Status Pin</b>             |  |

3. In bids where Consortia / Joint Ventures / Sub-contractors are involved; each party must submit a separate Tax Compliance Status Pin or CSD Registration number.
  
4. Applications for the Tax Clearance Certificates may also be made via e-Filing. In order to use this provision, taxpayers will need to register with SARS as e-Filers through the website ( [www.sars.gov.za](http://www.sars.gov.za) ).



**MBD 4 – DECLARATION OF INTEREST**

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

|            |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|------------|--|--|--|--|--|--|--|--|--|--|--|--|--|--|
| <b>3.1</b> | <b>Full Name of bidder or his or her representative</b>                          |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <b>3.2</b> | <b>Identity Number</b>   |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <b>3.3</b> | <b>Position occupied in the Company (Director, shareholder<sup>2</sup> etc.)</b> |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <b>3.4</b> | <b>Company Registration Number</b>   |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <b>3.5</b> | <b>Tax Reference Number</b>  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <b>3.6</b> | <b>VA T Registration Number</b>  |  |  |  |  |  |  |  |  |  |  |  |  |  |

|            |  |            |  |           |  |
|------------|--|------------|--|-----------|--|
| <b>3.7</b> | <b>Are you presently in the service of the state?</b>                        | <b>YES</b> |  | <b>NO</b> |  |
| 3.7.1      | If so, furnish particulars:  |            |  |           |  |
|            |  |            |  |           |  |
| <b>3.8</b> | <b>Have you been in the service of the state for the past twelve months?</b> | <b>YES</b> |  | <b>NO</b> |  |
| 3.8.1      | If so, furnish particulars:  |            |  |           |  |
|            |  |            |  |           |  |

|             |  |            |  |           |  |
|-------------|--|------------|--|-----------|--|
| <b>3.9</b>  | <b>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?</b>  | <b>YES</b> |  | <b>NO</b> |  |
| 3.9.1       | If so, furnish particulars:  |            |  |           |  |
|             |  |            |  |           |  |
| <b>3.10</b> | <b>Are you aware of any relationship (family, friend, other) between a bidder and any persons in the service of the state who may be involved with the evaluation and or adjudication of this bid?</b>                             | <b>YES</b> |  | <b>NO</b> |  |
| 3.10.1      | If so, furnish particulars:  |            |  |           |  |
|             |  |            |  |           |  |
| <b>3.11</b> | <b>Are any of the company's directors, managers, principal shareholders or stakeholders in the service of the state?</b>   | <b>YES</b> |  | <b>NO</b> |  |
| 3.11.1      | If so, furnish particulars:  |            |  |           |  |
|             |  |            |  |           |  |
| <b>3.12</b> | <b>Is any spouse, child or parent of the company's directors, managers, principal shareholders or stakeholders in the service of the state?</b>  | <b>YES</b> |  | <b>NO</b> |  |
| 3.12.1      | If so, furnish particulars:  |            |  |           |  |
|             |  |            |  |           |  |
| <b>3.13</b> | <b>Do you or any of the directors, trustees, managers, principal 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?</b> | <b>YES</b> |  | <b>NO</b> |  |
| 3.12.1      | If so, furnish particulars:  |            |  |           |  |
|             |  |            |  |           |  |

| 3.14                  | Please provide the following information on ALL directors / shareholders / trustees / members below: |                            |                               |
|-----------------------|--|----------------------------|-------------------------------|
| FULL NAME AND SURNAME | IDENTITY NUMBER  | PERSONAL INCOME TAX NUMBER | PROVIDE STATE EMPLOYEE NUMBER |
|                       |  |                            |                               |
|                       |  |                            |                               |
|                       |  |                            |                               |
|                       |  |                            |                               |
|                       |  |                            |                               |
|                       |  |                            |                               |

### **CERTIFICATION**

I certify that the information furnished on this declaration form is correct.

I accept that the state may act against me should this declaration prove to be false.

|                          |  |             |  |
|--------------------------|--|-------------|--|
| <b>SIGNATURE</b>         |  | <b>DATE</b> |  |
| <b>NAME OF SIGNATORY</b> |  |             |  |
| <b>POSITION</b>          |  |             |  |
| <b>NAME OF COMPANY</b>   |  |             |  |

MSCM Regulations: **“in the service of the state”** means to be –

1. a member of –
  - (i) any municipal council;
  - (ii) any provincial legislature; or
  - (iii) the National Assembly or the National Council of Provinces;
2. a member of the board of directors of any municipal entity;
3. an official of any municipality or municipal entity;
4. 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);
5. an executive member of the accounting authority of any national or provincial public entity; or
6. an employee of Parliament or a provincial legislature.

**“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.

MUNISIPALITEIT  
VAN  
PRINS ALBERT



MUNICIPALITY  
OF  
PRINCE ALBERT

**MBD 5 – DECLARATION FOR PROCUREMENT ABOVE R 10 MILLION  
(VAT INCLUDED)**

Not required for this tender.



**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
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

**1.2** The **80/20 preference point system** will be applicable in this tender. The lowest (goods and services) / highest (sales and leases) 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.
  - (i) B-BBEE status Level of Contributor; and
  - (ii) Locality of Supplier

**1.4** The maximum points for this tender are allocated as follows:

|  | <b>POINTS</b> |
|--|---------------|
| <b>PRICE</b>                                     | <b>80</b>     |
| <b>B-BBEE STATUS LEVEL OF CONTRIBUTOR</b>        | <b>10</b>     |
| <b>LOCALITY (See definitions)</b>                | <b>10</b>     |
| <b>TOTAL POINTS FOR PRICE AND SPECIFIC GOALS</b> | <b>100</b>    |

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

## 2. **DEFINITIONS**

- (a) “**B-BBEE**” means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- (b) “**B-BBEE status level of contributor**” means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- (c) “**bid**” means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of goods or services, through price quotations, advertised competitive bidding processes or proposals;
- (d) “**Broad-Based Black Economic Empowerment Act**” means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- (e) “**EME**” means an Exempted Micro Enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (f) “**functionality**” means the ability of a tenderer to provide goods or services in accordance with specifications as set out in the tender documents.
- (g) “**Locality**” means the local suppliers and/or service providers that business offices are within the Municipal area of Prince Albert (WC052).
- (h) “**price**” includes all applicable taxes less all unconditional discounts;
- (i) “**proof of B-BBEE status level of contributor**” means:
1. B-BBEE Status level certificate issued by an authorized body or person;
  2. A sworn affidavit as prescribed by the B-BBEE Codes of Good Practice;
  3. Any other requirement prescribed in terms of the B-BBEE Act;
- (j) “**QSE**” means a qualifying small business enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;

- (k) **“Specific goals”** means specific goals as contemplated in section 2(1)(d) of the Act which may include contracting with persons, or categories of persons, historically disadvantaged by unfair discrimination on the basis of race, gender and disability including the implementation of programmes of the Reconstruction and Development Programme as published in Government Gazette No. 16085 dated 23 November 1994;
- (l) **“Rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

### 3. 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:

$$\begin{array}{ccc}
 \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\
 \\
 Ps = 80 \left( 1 - \frac{Pt - P_{min}}{P_{min}} \right) & \mathbf{or} & Ps = 90 \left( 1 - \frac{Pt - P_{min}}{P_{min}} \right)
 \end{array}$$

Where

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

### 4. POINTS AWARDED FOR SPECIFIC GOALS

4.1 In terms of the Preferential Procurement Policy of Prince Albert Municipality, 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.

**SPECIFIC GOALS**

**SPECIFIC GOALS FOR THE TENDER AND POINTS CLAIMED ARE INDICATED PER THE TABLE BELOW:**

| The specific goals allocated points in terms of this tender | Number of points allocated - 80/20 system) |
|---|--|
| B-BBEE preference points                                    | 10 points                                  |
| Locality  | 10 points                                  |

**4.3** A maximum of 20 points (80/20 preference points system) or 10 (90/10) preference points system), will be allocated for specific goals. These goals are:

- (a) contracting with persons, or categories of persons, historically disadvantaged by unfair discrimination on the basis of race, gender or disability (BBBEE);
- (b) Promotion of enterprises located in the municipal area

**4.4** Regarding par 5.3(a), 50% of the 20/10 points will be allocated to promote this goal and points will be allocated in terms of the BBBEE scorecard as follows:

**4.5**

| B-BBEE Status Level of Contributor | Number of Points for Preference (80/20) | 50% of Points for Preference |
|------------------------------------|---|------------------------------|
| 1                                  | 20                                      | 10                           |
| 2                                  | 18                                      | 9                            |
| 3                                  | 16                                      | 8                            |
| 4                                  | 12                                      | 6                            |
| 5                                  | 8                                       | 4                            |
| 6                                  | 6                                       | 3                            |
| 7                                  | 4                                       | 2                            |
| 8                                  | 2                                       | 1                            |
| Non-compliant contributor          | 0                                       | 0                            |

- a) A tenderer must submit proof of its BBBEE status level contributor.
- b) A tenderer failing to submit proof of BBBEE status level of contributor –
  - (i) may only score in terms of the 80/90-point formula for price; and
  - (ii) scores 0 points out of 10/5 BBBEE status level of contributor, which is in line with section 2 (1) (d) (i) of the Act, where the supplier or service provider did not provide proof thereof.

**4.5.1 B-BBEE STATUS LEVEL OF CONTRIBUTOR CLAIMED IN TERMS OF PARAGRAPH 4.1**

B-BBEE Status Level of Contributor: .....

**(Only indicate your B-BBEE Status Level of Contributor – the points will be calculated by the Municipality)**

**4.5.2 LOCALITY**

Points for specific goals to promote suppliers or service providers located in a province, district or municipal area / (hereafter referred to as locality)

- a) Each tender must specify in the invitation to tender that a maximum of 50% of the 20 points will be allocated to promote the specific goal of locality.
- b) Only one of the points as set out below that best describes the enterprise’s locality may be awarded if applicable.
- c) Regarding par **5.3 (b)**, a maximum of 50% of the 20/10 points must be allocated to promote this goal. Maximum points will be allocated as follows

| <b>LOCALITY OF SUPPLIER/ LOCAL LABOUR</b>   | <b>POINTS</b> |
|---|---------------|
| Within the boundaries of the municipality   | 10            |
| Outside municipal boundaries, but within boundaries of district (Central Karoo)       | 8             |
| Outside boundaries of the municipality and district, but within Western Cape Province | 5             |
| Outside of the Western Cape Province  | 2             |

- d) Bidders must submit one of the following in order to receive points for the above-mentioned criterion.
  - (i) Municipal Account of address as indicated in bid document;
  - (ii) If the address as indicated in bid document is not in the name of the bidder, the latest lease agreement for this address or sworn affidavit of the owner stating occupancy.

- (iii) The premises of the bidder as indicated in MBD6.1 of the bid document as the business address should be established prior to the advertisement date.

**LOCALITY CLAIMED IN TERMS OF PARAGRAPHS 4.4**

Locality (indicate as per table above) : .....

(The address provided in 4.5 below, will be used to determine the locality as per 4.4.2 above).

**4.5) MUNICIPAL INFORMATION**

Municipality where business is situated: .....

Registered Account Number: .....

Stand Number: .....

**4.6) NAME OF COMPANY / FIRM**

.....

**4.7) COMPANY REGISTRATION NUMBER**

.....

**4.8) 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]

- 4.9) 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 BIDDER(S)**

**DATE:** .....

**ADDRESS:** .....

.....

.....

**WITNESSES:**

1. ....

2. ....



**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:
  - 3.1) abused the municipality’s / municipal entity’s supply chain management system or committed any improper conduct in relation to such system;
  - 3.2) been convicted for fraud or corruption during the past five years;
  - 3.3) wilfully neglected, reneged on or failed to comply with any government, municipal or other public sector contract during the past five years; or
  - 3.4) been listed in the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004).
4. In order to give effect to the above, the following questionnaire must be completed and submitted with the bid

|            |  |            |           |
|------------|--|------------|-----------|
| <b>4.1</b> | <p><b>Is the bidder or any of its directors listed on the National Treasury’s database as a company or person prohibited from doing business with the public sector?</b></p> <p><i>(Companies or persons who are listed on this database were informed in writing of this restriction by the National Treasury after the audi alteram partem rule was applied).</i></p>  | <b>YES</b> | <b>NO</b> |
| 4.1.1      | If so, furnish particulars:  |            |           |
| <b>4.2</b> | <p><b>Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)?</b></p> <p><i>(To access this Register, enter the National Treasury’s website, <a href="http://www.treasury.gov.za">www.treasury.gov.za</a> , click on the icon “Register for Tender Defaulters” or submit your written request for a hard copy of the Register to facsimile number (012) 3265445).</i></p> | <b>YES</b> | <b>NO</b> |

|       |   |            |           |
|-------|---|------------|-----------|
| 4.2.1 | If so, furnish particulars:   |            |           |
| 4.3   | <b>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?</b>   | <b>YES</b> | <b>NO</b> |
| 4.3.1 | If so, furnish particulars:   |            |           |
| 4.4   | <b>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?</b> | <b>YES</b> | <b>NO</b> |
| 4.4.1 | If so, furnish particulars:   |            |           |
| 4.5   | <b>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?</b>                         | <b>YES</b> | <b>NO</b> |
| 4.5.1 | If so, furnish particulars:   |            |           |

## 5. 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.

|                     |  |                     |  |
|---------------------|--|---------------------|--|
| <b>SIGNATURE</b>    |  | <b>NAME (PRINT)</b> |  |
| <b>CAPACITY</b>     |  | <b>DATE)</b>        |  |
| <b>NAME OF FIRM</b> |  |                     |  |



## **MBD 9 – CERTIFICATE OF INDEPENDENT BID DETERMINATION**

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

## CERTIFICATE OF INDEPENDENT BID DETERMINATION

**I, the undersigned, in submitting the accompanying bid:**

**Bid Number:**

**Description:**

In response to the invitation for the bid issued by the **PRINCE ALBERT MUNICIPALITY**, do hereby make the following statements that I certify to be true and complete in every respect:

certify, on behalf of (Name of Bidder):

That:

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder.
4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign, the bid, on behalf of the bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:
  - a) has been requested to submit a bid in response to this bid invitation;
  - b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
  - c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder
6. The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium<sup>3</sup> will not be construed as collusive bidding.
7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
  - a) prices;
  - b) geographical area where product or service will be rendered (market allocation)
  - c) methods, factors or formulas used to calculate prices;
  - d) the intention or decision to submit or not to submit, a bid;
  - e) the submission of a bid which does not meet the specifications and conditions of the bid; or
  - f) bidding with the intention not to win the bid.
8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.
9. The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly,

to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

10. I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of Section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

**CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM ARE 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.**

|                         |  |                  |  |
|-------------------------|--|------------------|--|
| <b>NAME<br/>(PRINT)</b> |  | <b>SIGNATURE</b> |  |
| <b>CAPACITY</b>         |  | <b>DATE</b>      |  |
| <b>NAME OF<br/>FIRM</b> |  |                  |  |

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

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

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



**MBD 15 – CERTIFICATE FOR PAYMENT OF MUNICIPAL SERVICES**

**DECLARATION IN TERMS OF CLAUSE 112(1) OF THE MUNICIPAL FINANCE  
MANAGEMENT ACT (NO.56 OF 2003)**

I, \_\_\_\_\_ (full name and ID no.), hereby acknowledge that according to SCM Regulation 38(1)(d)(i), the Municipality may reject the tender of the tenderer if any municipal rates and taxes or municipal service charges owed by the Tenderer or any of its directors/members/partners to the Prince Albert Municipality, or to any other municipality or municipal entity, are in arrears for more than 3 (three) months.

I declare that I am duly authorised to act on behalf of \_\_\_\_\_ (name of the firm) and hereby declare, that to the best of my personal knowledge, neither the firm nor any director/member/partner of said firm is in arrears on any of its municipal accounts with any municipality in the Republic of South Africa, for a period longer than 3 (three) months.

I further hereby certify that the information set out in this schedule and/or attachment(s) hereto is true and correct. The Tenderer acknowledges that failure to properly and truthfully complete this schedule may result in the tender being disqualified, and/or in the event that the tenderer is successful, the cancellation of the contract.

| <b>PHYSICAL BUSINESS ADDRESS(ES) OF THE TENDERER</b> | <b>MUNICIPAL ACCOUNT NUMBER</b> |
|--|---------------------------------|
|  |                                 |
|  |                                 |
|  |                                 |

| <b>FURTHER DETAILS OF THE BIDDER'S (Directors / Shareholders / Partners, etc.):</b>    |   |                                     |   |                                     |
|--|---|-------------------------------------|---|-------------------------------------|
| <b>Director / Shareholder / Partner</b>  | <b>Physical address of the Business</b> | <b>Municipal Account Number (s)</b> | <b>Physical / Residential address of the Director / Shareholder / Partner</b> | <b>Municipal Account Number (s)</b> |
|  |   |                                     |   |                                     |
|  |   |                                     |   |                                     |
|  |   |                                     |   |                                     |
|  |   |                                     |   |                                     |
|  |   |                                     |   |                                     |
|  |   |                                     |   |                                     |
|  |   |                                     |   |                                     |
|  |   |                                     |   |                                     |
| <b>NB: PLEASE ATTACH CERTIFIED COPY(IES) OF IDENTITY DOCUMENT(S).</b>                  |   |                                     |   |                                     |
| <b>NB: PLEASE ATTACH COPY(IES) OF MUNICIPAL ACCOUNTS.</b>                              |   |                                     |   |                                     |
| <b>NUMBER OF SHEETS APPENDED BY THE TENDERER TO THIS SCHEDULE (IF NIL, ENTER NIL).</b> |   |                                     |   |                                     |
| <b>NAME OF ENTERPRISE:</b>   |   |                                     |   |                                     |
| <b>NAME (PRINT):</b>   |   |                                     |   |                                     |
| <b>CAPACITY:</b>   |   |                                     |   |                                     |
| <b>SIGNATURE:</b>  |   | <b>DATE:</b>                        |   |                                     |

|   |   |
|---|---|
| <p style="text-align: center;"><b>COMMISSIONER OF OATHS</b></p> <p>Signed and sworn to before me at _____, on this _____ day of _____ 20__</p> <p>by the Deponent, who has acknowledged that he/she knows and understands the contents of this Affidavit, it is true and correct to the best of his/her knowledge and that he/she has no objection to taking the prescribed oath, and that the prescribed oath will be binding on his/her conscience.</p> <p><b>COMMISSIONER OF OATHS:</b></p> <p>Position: _____</p> <p>Address: _____</p> <p>Tel: _____</p> | <p><b>Apply official stamp of authority on this page:</b></p> |
|---|---|



**E-TENDER DECLARATION**

It is compulsory to confirm “YES” or “NO” on all line items.

| DESCRIPTION   | COMPLY<br>(YES / NO) |
|---|----------------------|
| The original document collected from the Municipality must be submitted or, if documents are printed from the e-tender website, the original, printed document must be submitted, clearly reflecting all writing and signatures in black ink. Copied documents where the writing and signatures is unclear and/or copied will render the tender non-responsive. |                      |
| Print the tender document with a quality printer. If the wording is unclear, the document will be discarded.  |                      |
| Printed documents must be binded securely according to page numbers to prevent pages getting lost. Missing pages will render the tender non-responsive. Do not staple the pages together.   |                      |
| The Price Schedule and All Annexures with compulsory attachments must be binded to the back of the document.  |                      |
| No alterations of the document will be accepted. Any alterations will disqualify the tender.  |                      |

It is compulsory to comply and sign below if the tenderer agrees to the requirements above.

I accept and approve all of the above.

.....  
**Signature of Bidder**

**MUNISIPALITEIT  
VAN  
PRINS ALBERT**



**MUNICIPALITY  
OF  
PRINCE ALBERT**

**PART B – TENDER SPECIFICATIONS AND PRICING SCHEDULE**



**TENDER SPECIFICATIONS**

**TENDER 113 / 2023**

**PROVISION OF AN ELECTRONIC WEB-BASED PERFORMANCE  
MANAGEMENT SYSTEM AND RELATED CONSULTING ACTIVITIES FOR A  
CONTRACT PERIOD ENDING 30 JUNE 2026.**

**1. INTRODUCTION AND BACKGROUND**

Prince Albert Municipality hereby invites formal tenders from suitable service providers for the establishment of an electronic web-based performance management and -development system and software application processes for a contract period ending 30 June 2023.

**2. CURRENT STATE**

The municipality does not have a service provider and/or electronic performance management system in place.

**3. SCOPE OF WORK**

To establish an effective and efficient performance management and-development system and software application within Prince Albert Municipality in terms of organisational and individual performance requirements. The service provider must adhere to the following:

- 3.1) Conduct a comprehensive assessment of the status quo of the Municipality against the provisions as stipulated in the relevant Chapters of the Local Government: Municipal Staff Regulations (GN 890) and Guidelines (GN 891) and analyse and address gaps in terms of processes, procedures, strategies and policies, of Prince Albert Municipality in accordance with the relevant Chapters of the Local Government: Municipal Staff Regulations (GN 890) and Guidelines (GN 891) in addition, provide,

implement and roll-out a performance management and-development system and software application in terms of the below minimum regulatory requirements, but not limited to:

- a) Performance Management Statutory Requirements;
- b) Organisational Performance Management;
- c) Individual Performance Management;
- d) Performance Moderation;
- e) Reporting;
- f) Portfolio of Evidence;
- g) Security/Archiving/User Management; and
- h) other Support Functions and Services.

3.2) Service providers must familiarise themselves with all the Chapters of the Local Government: Municipal Staff Regulations (GN 890) and Guidelines (GN 891) in order to ensure the interlinkage and interdependence between the different Chapters and the implementation timelines as per Circular 12 of 2022 of the Department Cooperative Governance (COGTA).

3.3) The performance management and-development system and software application must comply with the Local Government: Municipal Staff Regulations (GN 890) and Guidelines (GN 891) in managing performance and development within the Municipality in terms of the following Chapters:  
Chapter 2 - Staff Establishment, Job Description and Job Evaluation;  
Chapter 3 - Recruitment, Selection and Appointment of Staff;  
Chapter 4 - Performance Management and-Development System; and  
Chapter 5 - Skills Development

3.4) The performance management and-development system and software application must comply. The system must continuously be upgraded in line with any amendments to circulars, applicable regulations and legislation.

3.5) The major requirements, main features and functional specifications of the envisaged performance management and-development system and software application are detailed below:

| <b>PROVISION OF VARIOUS HOSTED WEB BASED ELECTRONIC MANAGEMENT SYSTEMS FOR THE FOLLOWING FUNCTIONS</b>  |   |
|---|---|
| <b>ELECTRONIC PERFORMANCE MANAGEMENT SYSTEM (PMS)</b>   |   |
| <p align="center"><b>Electronic organisational performance management system including an electronic system to manage the Service Delivery Budget Implementation system (SDBIP) and the Local Government Staff Regulations, 2021.</b></p> | <ul style="list-style-type: none"> <li>(a) Electronic web based organisational performance management system to be provided and hosted by the service provider;</li> <li>(b) Facilitate the management and reporting of the SDBIP;</li> <li>(c) The system must be able to integrate with the financial system and address all MSCOA requirements;</li> <li>(d) Drafting of the SDBIP's (if required);</li> <li>(e) Loading of the SDBIP;</li> <li>(f) Link indicators to the strategic objectives of Local, Provincial and National Government;</li> <li>(g) Link indicators to the risks or other strategic plans;</li> <li>(h) Link indicators to the segments of mSCOA (funding, function, item, regional indicator, municipal standard classification, project and costing);</li> <li>(i) Assistance during the mid-year to review the SDBIP and load the revisions (if required);</li> <li>(j) Training sessions to staff to effectively use the system;</li> <li>(k) System to allow for reports to be generated on the progress with the implementation of the SDBIP and for mitigation efforts;</li> <li>(l) Assistance during the quarterly organisational performance review process (if required)</li> <li>(m) Transfer of data from the current system to the new system, data setup and support (if required).</li> </ul> |
| <p align="center"><b>Performance agreements for senior management</b></p>   | <ul style="list-style-type: none"> <li>(a) Electronic web based individual performance management system to be provided and hosted by the service provider;</li> <li>(b) Drafting of performance agreements that are electronically managed (if required);</li> <li>(c) Ensuring that performance agreements comply with all legislative requirements;</li> <li>(d) Facilitate the performance reviews of senior management (if required);</li> </ul>   |

|   |  |
|---|--|
|   | <p>(e) Provide hands on support for end year evaluations by attending the panel meetings, training and guiding the panel members, calculating the results and submitting a report on the evaluations to the municipality for tabling to the municipal council (if required);</p> <p>(f) Provide hands on support for mid-end year evaluations, if required by the municipality, by attending the panel meetings, training and guiding the panel members, calculating the results and submitting a report on the evaluations to the municipality for tabling to the municipal council (if required);</p> <p>(g) Make provision for assistance without having a formal panel as during mid-year evaluations. Preparing evaluations templates and assist with calculations (if required).</p>   |
| <p><b>Performance plans for all staff excluding senior management</b></p> | <p>(a) Populate set dates of key events, including evaluation periods per financial year from 1 July to 30 June.</p> <p>(b) Develop and populate performance agreements for all individuals, excluding senior managers. The performance agreement must include a performance plan that contains the following:</p> <ul style="list-style-type: none"> <li>(i) Name, job title and the department of the staff member;</li> <li>(ii) Objectives or targets;</li> <li>(iii) KPA's, their weightings and the target date for meeting the KPA. Ensure that KPA's relate to a staff member's functional area and must consist of not less than 5 and not more than 7 KPA's;</li> <li>(iv) KPI's and the performance standard for each KPI. Develop SMART KPI's for all staff members that are aligned to each individual staff members' line manager;</li> <li>(v) Name and definition of the job specific competencies as derived from Annexure A of the Municipal Staff Regulations (maximum of 6 competencies within a performance cycle), their weightings and the expected level of capability for each competency;</li> <li>(vi) A personal development plan prepared in compliance with the Work Skills Plan;</li> <li>(vii) Performance plans aligned to the job description and organisational structure; and</li> <li>(viii) The process of monitoring and assessing performance, including the planned dates of assessment.</li> </ul> |

- (c) Alignment of performance agreements of individual staff members with the performance agreements of senior managers;
- (d) Assess, advise and guide:
  - Predetermined core competencies and align to relevant job descriptions;
  - Job specific competencies and align to relevant job descriptions;
  - Assess job specific competencies and determine skills development gaps;
  - Qualifications and record of formal and informal training and experience; and
  - Long term and intermediate career goals.
- (e) The revision of the calculation of the outcomes of performance assessments (weightings and scores).
- (f) Maintain and update an accessible Library of KPI's.
- (g) Provide for early warning when underperformance of KPI's is detected. In the case of underperformance – reasons for such underperformance as well as corrective measures per KPI
- (h) Uploading and storage of portfolios of evidence, including e-mails and attachments with metadata as a record.
- (i) Set deadlines for reporting on indicators monthly;
- (j) Generate e-mails to inform users of deadlines for reporting;
- (k) Report on actual performance on KPI's in number, percentage or Rand value;
- (l) Performance Agreements template including PDP as per MSR;
- (m) Self-evaluation by system and non-system users;
- (n) Evaluation by line managers;
- (o) An evaluation template for non-system users (Team based performance management);
- (p) A performance calendar with alerts that must be able to trigger the execution of actions (e.g. collecting

information from a database, performing calculations, etc.);

- (q) Calculation of scores for performance assessment purposes, in line with applicable legislation;
- (r) Provide for time restrictions, which escalate the work to another user or sends a message to a specified user should the work not be performed within the specified time limit;
- (s) Skills module (based on competency framework) that is aligned to the Workplace Skills Plan and the requirements of the performance management system, to determine/review skills gaps via personal development plans (PDP's) and provide functionality for skills audits, in line with the guidelines / format of CoGTA;
- (t) The following reports should be generated from the system:
  - Performance and evaluation status report;
  - Evaluation score report;
  - Personal development plan report;
  - Login attempt report;
  - User activity report;
  - Monthly backup reports;
  - System updates and maintenance reports.
- (u) Assist in drafting of performance plans according to the Municipal Staff Regulations that are electronically managed: Ensuring alignment between performance plans and the performance agreements of senior management; and
- (v) Training to implement performance and facilitate processes as well as the processes and electronic evaluation of performance.
- (w) Upload and store portfolios of evidence, including e-mails and attachments with metadata as a record.

|  |   |
|--|---|
|  | <p>(x) Allow for multiple users to have more than one role (e.g., module administrator, admin, manager);</p> <p>(y) Allow for different usernames to be assigned to the same role;</p> <p>(z) The system must incorporate all prescribed templates and documents in terms of applicable legislation, as well as provide for the development of new/alternative templates and documents, and where applicable, export documents in hard copy format.</p> <p><b>PERFORMANCE MODERATION</b></p> <p>(a) Facilitate the functioning of all regulated performance management related committees at organisational, departmental and individual levels.</p> <p>(b) Allow for outcomes of moderation committees to be populated electronically.</p> |
| <b>Electronic risk management system</b>       | <p>Electronic risk management system to be provided and hosted for the recording of the risk register and actions created to mitigate risks;</p> <p>(a) The system must be able to integrate with the SDBIP and address the mSCOA requirements;</p> <p>(b) System to allow for reports to be generated on the management of the risks and the actions. Examples of reports should include:</p> <ul style="list-style-type: none"> <li>▪ Risk registers (Strategic and departmental)</li> <li>▪ Action plan registers (Progress on action plans);</li> <li>▪ Transfer of data from the risk registers to new system;</li> <li>▪ Setup and implementation of software;</li> <li>▪ Training on the use of the software.</li> </ul>             |
| <b>Electronic compliance management system</b> | <p>(a) Electronic database to be provided and hosted of all legal required compliance matters;</p> <p>(b) Electronic recording of compliance actions taken to ensure legal compliance;</p> <p>(c) System to allow for reports to be generated on the compliance.</p>  |

|   |   |
|---|---|
|   | <ul style="list-style-type: none"> <li>(d) Transfer of data from current system to new system</li> <li>(e) Setup and implementation of software</li> <li>(f) Training on the use of the software</li> </ul>   |
| <p><b>Annual Reports<br/>(If required)</b></p>        | <ul style="list-style-type: none"> <li>(a) Compilation of the Annual Report;</li> <li>(b) Provide templates to be completed by the municipality on all legally required information to be included the annual report;</li> <li>(c) The municipality will submit the relevant information on the templates;</li> <li>(d) Service provider to ensure that the report complies with all legal requirements and to validate the information;</li> <li>(e) Deal with auditor general enquires in the annual report as referred to the service provider by the municipality.</li> </ul> |
| <p><b>Mid-year report<br/>(If required)</b></p>       | <ul style="list-style-type: none"> <li>(a) Formalise and preparing report for submission to the municipal council;</li> <li>(b) The municipality will draft the section 72 report and it will be provided to the service provider to be included in the final report;</li> <li>(c) Service provider to ensure that the report complies with all legal requirements and to validate the information.</li> </ul>  |
| <p><b>SDBIP system descriptions (If required)</b></p> | <ul style="list-style-type: none"> <li>(a) Facilitate sessions to draft the system descriptions for the TL SDBIP KPI's</li> <li>(b) Draft and submit the system description</li> </ul>  |

|   |  |
|---|--|
| <p><b>Support and related matters</b></p> | <ul style="list-style-type: none"> <li>(a) Provide for the transfer of data from current systems to the new system in an appropriate format.</li> <li>(b) Ongoing support via a helpdesk and per email responding to all related requests within 48 hours.</li> <li>(c) Ongoing user support via a Support Desk responding to all system related email requests within 48 hours.</li> <li>(d) Reasonable means to ensure the security of data in the municipality's database (Comply with the ICT framework requirements).</li> <li>(e) Data to be backed up on a weekly basis.</li> <li>(f) Maintenance and updating of modules to comply with minimum legislative requirements.</li> <li>(g) Hands-on support to implement performance management on senior management and individual staff as and when required.</li> <li>(h) Training sessions to staff to effectively use the system as and when required.</li> <li>(i) Assistance with the drafting and finalising of the Performance Management Policy Framework.</li> <li>(j) Ensuring adequate skills Transfer to relevant Municipal Officials</li> </ul> |
|---|--|

#### 4. **GENERAL**

- 4.1) It is the intention to appoint the successful tenderer for a contract period ending 30 June 2026, to ensure the success of the project and to provide the municipality with the necessary business continuity and the building of institutional knowledge and capacity.
- 4.2) The successful tenderer is to provide the necessary electronic software and support to assist with the management of municipal performance and related activities.
- 4.3) **It is critical that the service provider to be appointed should have extensive proven experience of five (5) years minimum**, in all the items listed below and must therefore be able to provide references/written confirmation of all such projects successfully undertaken in the past, for each of the items listed below. Failure to provide sufficient evidence as well as contactable references will exclude tenderers from earning points for functionality criteria as listed hereunder.
- 4.4) Submit data in a format that will assist with the implementation and continuous compliance with the Municipal Standard Chart of Accounts (mSCOA) Regulations, as prescribed by National Treasury (NT).
- 4.5) The system must make use of a trusted SSL certificate 256bit or better.
- 4.6) The system must be compatible with Windows Internet Explorer or Edge as provided in the latest builds of Windows 10.

#### 5. **FINANCIAL SYSTEM INTEGRATION & MSCOA**

- 5.1) The bidder's program/system and/or data must be able to integrate with the municipal Financial System if required.
- 5.2) Assist with audit queries, if applicable.
- 5.3) The data and/or system must include all the required data fields as required by the municipality.
- 5.4) Considering the constant change in financial reforms and reporting requirements, it would be to the bidder's advantage if its system could add and/or delete data fields as required.
- 5.5) The bidder must have systems in place to ensure data is safely stored, secured and backed-up.

- 5.6) Skills transfer through on-the-job training with the specific aim to empower municipal staff to execute their duties unassisted.
- 5.7) The data remains the property of the municipality and at the end of the contract the data must be handed over to the Municipality.

## 6. **ICT REQUIREMENTS**

- 6.1) The system must comply with Prince Albert Municipality's ICT User Access Management and Security Controls policies.
- 6.2) System must be able to provide audit event log report in delimited csv or excel format per user.
- 6.3) Must provide administrative user for use by Municipal staff to manage other users and training.
- 6.4) Must adhere to providing a quarterly call log or issue report together with resolved times for our performance management compliance.
- 6.5) The system must be compatible with one or more well used browsers and the browser must be under support for the product owner for the duration of the term as stated above.
- 6.6) Provide the following reviews including resolving actions:
  - (a) Monthly Administrator Activity Review (Audit trail) as per ICT Policies;
  - (b) Quarterly User Account permission review as per ICT Policies, and
- 6.7) The system must provide for accurate reporting the relevant forms and templates, including, but not limited to:
  - (a) Functionality to populate reports for specified and/ or legislative time frames per Department/Division/Unit, inclusive of graphs;
  - (b) Monthly backup reports; and
  - (c) System updates and maintenance reports.
  - (d) Functionality to broadly customize reports and select various filter by fields.
  - (e) Option to generate reports onscreen / PDF / Microsoft suite format.

- (f) Provides a log of every activity performed on a document and system.
- (g) Provide profile history Organisational, Departmental, Divisional and Individual.
- (h) Access control must provide for: ▪ Read only ▪ Create ▪ Update ▪ Delete.
- (i) Access control must be specified at: ▪ User level ▪ Group Level ▪ Role Level.
- (j) Disaster recovery plan must be in place to retrieve data from a specific point in time.
- (k) Data to be backed up daily.
- (l) Implementation of processes and programmes to ensure that all the data is always secured at not accessible by any unauthorised parties.

## 7. **DATA**

- 7.1) The Municipality remains the owner of all Data generated because of the Municipality using the Service Providers services.
- 7.2) The successful service provider may be requested to supply data diagram and data flow charts.
- 7.3) The service provider must have data protection mechanisms to protect data from unauthorized internal and external access.
- 7.4) The files used for integration with the financial system must at no point be accessible for human manipulation of tampering.

## 8. **SECURITY**

- 8.1) Access must follow a “principle of least-privilege” approach, whereby all access is revoked by default and users are only allowed access based on their specific requirements.
- 8.2) A facility must exist for Reviewing user access permissions; and User and administrator activity monitoring.
- 8.3) The systems must establish an audit trail to log all attempts to alter or edit electronic records and their metadata.
- 8.4) Access controls must protect records against unauthorized access and tampering.

- 8.5) The system must ensure that electronic records, that must be legally admissible in court and carry evidential weight, are protected to ensure that they are authentic, not altered or tampered with, auditable and produced in systems which utilize security measures to ensure their integrity.
- 8.6) The Promotion of Access to Information Act, Act No. 2 of 2000, gives effect to the right to access personal information held by the Municipality and must be complied with.
- 8.7) The Protection of Personal Information Act, Act No. 4 of 2013, gives effect to the right to privacy and must be complied with.

9. **APPLICABLE STANDARDS, SPECIFICATIONS AND REGULATIONS**

- 9.1) Supply Chain Management (SCM) Regulations
- 9.2) Prince Albert Municipal Supply Chain Management Policy
- 9.3) Preferential Procurement Regulations, 2022
- 9.4) Local Government Municipal Finance Management Act, 2002 (Act 56 of 2003)
- 9.5) Municipal Standard Chart of Accounts (mSCOA) Regulations
- 9.6) Local Government: Municipal Systems Act, 2000 (Act 32 of 2000)
- 9.7) Local Government: Municipal Planning and Performance Management Regulations, 2001.

10. **ESTIMATED QUANTITIES REQUIRED**

- 10.1) The quantities indicated in the pricing schedule may vary from the actual quantities required by the Municipality;
- 10.2) Quantities might be reduced or increased depending on the available budget.

11. **DELIVERY**

- 11.1) Services will commence on a programme to be determined by the parties once the tender has been awarded;
- 11.2) System access must be available 7 days a week 365 days a year;
- 11.3) System downtime must not exceed 12 hours at a time;

11.4) System issues to be resolved within 1 hour of call being logged.

## 12. **EVALUATION**

12.1) Tenders will be evaluated on a comparative basis, which is the reason for the design of the tender specification and additional schedules (if applicable).

12.2) 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), the Preferential Procurement Policy Framework Act, Act 5 of 2000 (read with its accompanying regulations) as well as the Prince Albert Municipality's Supply Chain Management and Preferential Procurement Policies.

12.3) Points will be awarded to tenderers who are eligible for preferences in terms of MBD 6.1: Preference Point Claim Schedule (where preferences are granted in respect of B-BBEE contribution and Locality)

12.4) The terms and conditions of MBD 6.1 shall apply in all respects to the tender evaluation process and any subsequent contract.

12.5) The evaluation will include verifying the tenderers compliance with the specifications, as well as a Functionality Evaluation related to the proposed solution as well as the service provider's capacity to implement.

## 13. **CONTACT PERSON (TECHNICAL / SPECIFICATION RELATED ENQUIRIES)**

**Mr. George van der Westhuizen**

Senior Manager: Corporate and Community Services

Tel: 023 541 1036

Cell: 074 303 7575

Email: [george@pamun.gov.za](mailto:george@pamun.gov.za)

## TENDER FUNCTIONALITY

1. This bid is subject to functionality scoring.

2. Bidders must obtain a minimum functionality scoring of 80 out of 100 points (80%) in order for bids to be marked as responsive. Bids that do not meet the minimum functionality scoring as indicated, will be regarded as non-responsive and not be evaluated on price and preference points.

3. Applicable criteria:

| DESCRIPTION  | MEASUREMENT (RSA MUNICIPALITY)   | MAXIMUM POINTS | POINTS SCORED |
|--|--|----------------|---------------|
|  |  | AVAILABLE      | BY THE BIDDER |
| <p><b><u>EXPERIENCE OF BIDDING FIRM</u></b></p> <p>Number of years that the firm are in existence:</p> <ul style="list-style-type: none"> <li>▪ 0 - 5 years = 2 points</li> <li>▪ 6 – 10 years = 5 points</li> <li>▪ &gt; 10 years = 10 points</li> <li>▪</li> </ul>                             | <p>a) Submission of detailed company profile</p> <p>b) EVIDENCE FOR THE DIFFERENT EXPERIENCE IN THE COMPANY PROFILE ADDRESSING THE KEY ASPECTS MUST BE INCLUDED.</p>   | <b>10</b>      |               |
| <p><b><u>EXPERIENCE OF KEY PERSONNEL</u></b></p> <p>Number of Years of Experience of the Key Personnel.</p> <p>Experience relating to:</p> <ul style="list-style-type: none"> <li>a) SDBIP</li> <li>b) Organisation and Individual Performance Management</li> <li>c) Risk Management</li> </ul> | <p>a) Attach CVs with evidence of experience. PLEASE PROVIDE EVIDENCE FOR THE DIFFERENT EXPERIENCE IN THE COMPANY PROFILE ADDRESSING THE KEY ASPECTS.</p> <p>b) Attach CVs of personnel relating to experience in:</p> | <b>40</b>      |               |

|  |   |                   |  |
|--|---|-------------------|--|
| <p><b><u>PREVIOUS EXPERIENCE</u></b></p> <p>Performed Performance Management and related process at other municipalities/ entities without any major findings affecting the audit report in terms of the Performance Management processes.</p> <p>Evidence to be provided in form of confirmation from respective clients:</p> <ul style="list-style-type: none"> <li>▪ 0-4 references = 0 points</li> <li>▪ 5-6 references = 15 points</li> <li>▪ More than 6 references = 30 points</li> </ul> | <p>a) At least 5 municipalities/ municipal entity per audit</p> <p>b) Provide evidence per AG Audit in form of previous or current clients.</p> <p>c) On Municipality letterhead and confirmation from AG for clean audits</p>  | <p><b>30</b></p>  |  |
| <p><b><u>mSCOA</u></b></p> <p>Does the program/system make provision for mSCOA</p> <ul style="list-style-type: none"> <li>▪ Submission of information = 10 points</li> <li>▪ No information submitted / less than three (3) letters submitted = 0 points</li> </ul>  | <p>a) Letter from 3 Western Cape municipalities where mSCOA processes have already been assessed and which confirms that the program/system complies with mSCOA.</p> <p>b) Alternatively, bidders must provide evidence that their business processes and/or system have made provision for the 7 segments of mSCOA</p> | <p><b>10</b></p>  |  |
| <p><b><u>TRANSFER OF SKILLS</u></b></p> <p>Skills transfer through on-the-job training with the specific aim to empower municipal staff to execute their duties unassisted.</p> <ul style="list-style-type: none"> <li>▪ Submission of information = 10 points</li> <li>▪ No information submitted = 0 points</li> </ul>   | <p>For five Western Cape municipalities where this has been successfully implemented. Provide evidence (Testimonials, attendance registers, copy of module etc.) The municipality reserves the right to visit these municipalities to confirm successful implementation.</p>  | <p><b>10</b></p>  |  |
| <p><b>TOTAL POINTS FOR FUNCTIONALITY SCORING</b></p>   |   | <p><b>100</b></p> |  |

## MBD 3.2 – PRICING SCHEDULE FOR SERVICES

**INSTRUCTIONS:**

1. Only firm prices will be accepted. Non-firm prices will not be considered.
2. All delivery costs MUST be included in the bid price, for delivery at the prescribed destination.
3. Document MUST be completed in non-erasable black ink.
4. NO correction fluid/tape may be used.
5. In the event of a mistake having been made, it shall be crossed out in ink and be accompanied by an initial at each and every alteration.
6. The Bidder MUST indicate whether he/she/the entity is a registered VAT Vendor or not.
  - a) In the case of the Bidder not being a registered VAT Vendor, both columns

|   | INDICATE WITH AN "X" |  |  |  |  |  |  |    |  |  |  |  |
|---|----------------------|--|--|--|--|--|--|----|--|--|--|--|
| Are you/is the firm a registered VAT Vendor | YES                  |  |  |  |  |  |  | NO |  |  |  |  |
| If "YES", please provide VAT number         |                      |  |  |  |  |  |  |    |  |  |  |  |

I / We \_\_\_\_\_ (full name of Bidder) the undersigned in my capacity as \_\_\_\_\_ of the firm hereby offer to Prince Albert Municipality to render the services as described, in accordance with the specification and conditions of contract to the entire satisfaction of the Prince Albert Municipality and subject to the conditions of tender, for the amounts indicated hereunder:

**PRICING SCHEDULE**

The table below indicates how the tariffs or rates for the different functions should be outlined. The municipality reserves the right to call upon the tenderer for all or any of the functions below and the estimated time spent on the project must be agreed upon between the parties in writing.

**1. Systems and hardware required**

The tender prices are as follow (Inclusive of VAT):

| DESCRIPTION  | R           |             |             |
|--|-------------|-------------|-------------|
| Program and hardware required/ Initial setup cost.<br>- Submit full list with breakdown of cost on all hardware required on separate document<br>- Fixed capital cost. |             |             |             |
|  | R           |             |             |
|  | 2023 / 2024 | 2024 / 2025 | 2025 / 2026 |
| Electronic organisational performance management system including an electronic system to manage the Service delivery and budget implementation system (SDBIP)         |             |             |             |
| Electronic individual performance management system for senior management  |             |             |             |
| Electronic individual performance management system for other staff  |             |             |             |
| Electronic risk management system  |             |             |             |
| Electronic compliance management system  |             |             |             |
| <b>TOTAL</b>   |             |             |             |

- Must be tendered as a fixed price from the point of receipt of all the relevant data sources from the municipality during the first year of appointment.
- Management and other fees:
  - The tender prices as follows: (inclusive of VAT):

| ACTIVITY  | QUANTITY  | 2023/2024        |                        |                 | 2024/2025        |                        |                 | 2025/2026        |                        |                 |
|---|---|------------------|------------------------|-----------------|------------------|------------------------|-----------------|------------------|------------------------|-----------------|
|   |   | Monthly user fee | Fixed Fee per activity | Other (specify) | Monthly user fee | Fixed Fee per activity | Other (specify) | Monthly user fee | Fixed Fee per activity | Other (specify) |
| Drafting of SDBIP   | Fixed Price per annum                                 |                  |                        |                 |                  |                        |                 |                  |                        |                 |
| Loading the SDBIP   | Fixed Price per annum                                 |                  |                        |                 |                  |                        |                 |                  |                        |                 |
| Assistance with the drafting of the TL SDBIP KPI system descriptions  |   |                  |                        |                 |                  |                        |                 |                  |                        |                 |
| Mid-year amendments to the SDBIP  | Fixed Price per annum                                 |                  |                        |                 |                  |                        |                 |                  |                        |                 |
| Loading mid-year amendments to the SDBIP  | Fixed Price per annum                                 |                  |                        |                 |                  |                        |                 |                  |                        |                 |
| Loading the risk register   | Fixed Price per annum                                 |                  |                        |                 |                  |                        |                 |                  |                        |                 |
| Drafting of Performance agreements for senior management  | Per each agreement as required. The                   |                  |                        |                 |                  |                        |                 |                  |                        |                 |
| Assisting with the Performance evaluations for senior management. Including attending the panel meeting.          | municipality has three (3) senior managers currently. |                  |                        |                 |                  |                        |                 |                  |                        |                 |
| Provide assistance during mid-year for evaluation of senior management performance where the panel is not sitting |   |                  |                        |                 |                  |                        |                 |                  |                        |                 |

|   |                       |  |  |  |  |  |  |  |  |  |
|---|-----------------------|--|--|--|--|--|--|--|--|--|
| Assistance in developing KPA's and KPI's for each post, including core competencies | Each staff member     |  |  |  |  |  |  |  |  |  |
| Assistance in compiling electronic Performance Agreements for each post.            | Each staff member     |  |  |  |  |  |  |  |  |  |
| Assist in drafting Performance plans for all staff excluding senior management      | Each staff member     |  |  |  |  |  |  |  |  |  |
| Annual Report   | Fixed Price per annum |  |  |  |  |  |  |  |  |  |
| Mid-year report   | Fixed Price per annum |  |  |  |  |  |  |  |  |  |
| SDBIP user subscription fee   | Unit                  |  |  |  |  |  |  |  |  |  |
| Performance management user fee.  | Unit                  |  |  |  |  |  |  |  |  |  |
| Risk management user fee  | Unit                  |  |  |  |  |  |  |  |  |  |
| Compliance user subscription fee  | Unit                  |  |  |  |  |  |  |  |  |  |
| Data storage specify and give detail on what it entails.                            | Fixed fee per annum   |  |  |  |  |  |  |  |  |  |
| Audit queries specify and give detail on what it entails                            |                       |  |  |  |  |  |  |  |  |  |
| Support specify and give detail on what is entails                                  |                       |  |  |  |  |  |  |  |  |  |

|  |           |  |  |  |  |  |  |  |  |  |
|--|-----------|--|--|--|--|--|--|--|--|--|
| Training & facilitate                                    | Unit      |  |  |  |  |  |  |  |  |  |
| Disbursements specify and give detail on what it entails |           |  |  |  |  |  |  |  |  |  |
| Disbursements specify and give detail on what it entails |           |  |  |  |  |  |  |  |  |  |
| <b>COSTS FOR TRAVELLING AND SUBSISTENCE</b>              |           |  |  |  |  |  |  |  |  |  |
| Travelling   | 840km     |  |  |  |  |  |  |  |  |  |
| Daily Expenses   | Per day   |  |  |  |  |  |  |  |  |  |
| Accommodation per night                                  | Per night |  |  |  |  |  |  |  |  |  |
| Other  | flights   |  |  |  |  |  |  |  |  |  |

|  |                        |
|--|------------------------|
| <b>SIGNATURE OF PRINCE ALBERT</b><br><br><b>MUNICIPALITY OFFICIALS AT</b><br><br><b>TENDER OPENING</b> | 1. ....<br><br>2. .... |
|--|------------------------|



**MBD 7.1 - CONTRACT FORM – PURCHASE OF GOODS / WORKS**

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

**PART 1 (TO BE FILLED IN BY THE BIDDER)**

1. I hereby undertake to supply all or any of the goods and/or works described in the attached bidding documents to **PRINCE ALBERT MUNICIPALITY** in accordance with the requirements and specifications stipulated in bid number **113/2023** 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 time of 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);
    - Technical Specification(s);
    - Preference claims for Broad Based Black Economic Empowerment Status Level of Contribution in terms of the Preferential Procurement Regulations 2022;
    - 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 goods and/or works 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 fulfilment 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 .....

|                  |       |
|------------------|-------|
| <b>WITNESSES</b> |       |
| 1                | ..... |
| 2.               | ..... |
| DATE:            | ..... |

**CONTRACT FORM - PURCHASE OF GOODS/WORKS**

**PART 2 (TO BE FILLED IN BY THE PURCHASER)**

1. I, ..... in my capacity as ..... , accept your bid under reference number .....dated.....for the supply of goods/works indicated hereunder and/or further specified in the annexure(s).
  
2. An official order indicating delivery instructions is forthcoming.
  
3. I undertake to make payment for the goods/works delivered in accordance with the terms and conditions of the contract, within 30 (thirty) days after receipt of an invoice accompanied by the delivery note.

| ITEM | PRICE<br>(ALL APPLICABLE<br>TAXES INCLUDED) | BRAND | DELIVERY PERIOD | B-BBEE STATUS<br>LEVEL OF<br>CONTRIBUTION |
|------|---|-------|-----------------|---|
|      |   |       |                 |   |

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

SIGNED AT .....ON.....

NAME (PRINT) .....

SIGNATURE .....

OFFICIAL STAMP

WITNESSES

1. ....

2. ....

DATE .....

WITNESSES



**MBD 7.2 - CONTRACT FORM – RENDERING OF SERVICES**

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

**PART 1 (TO BE FILLED IN BY THE BIDDER)**

- 7. I hereby undertake to render services described in the attached bidding documents to **PRINCE ALBERT MUNICIPALITY** in accordance with the requirements and task directives / proposals specifications stipulated in Bid Number **113/2023** 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.
  
- 8. The following documents shall be deemed to form and be read and construed as part of this agreement:
  - (iv) Bidding documents, viz
    - Invitation to bid;
    - Tax clearance certificate;
    - Pricing schedule(s);
    - Technical Specification(s);
    - Preference claims for Broad Based Black Economic Empowerment Status Level of Contribution in terms of the Preferential Procurement Regulations 2022;
    - Declaration of interest;
    - Declaration of bidder's past SCM practices;
    - Certificate of Independent Bid Determination;
    - Special Conditions of Contract;
  - (v) General Conditions of Contract; and
  - (vi) Other (specify)
  
- 9. 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 goods and/or works 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.
  
- 10. 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 fulfilment of this contract.
  
- 11. I declare that I have no participation in any collusive practices with any bidder or any other person regarding this or any other bid.
  
- 12. I confirm that I am duly authorised to sign this contract.

NAME (PRINT) .....

CAPACITY .....

SIGNATURE .....

NAME OF FIRM .....

DATE .....

WITNESSES

1 .....

3. ....

DATE: .....

**CONTRACT FORM - PURCHASE OF GOODS/WORKS**

**PART 2 (TO BE FILLED IN BY THE PURCHASER)**

4. I, ..... in my capacity as ..... , accept your bid under reference number .....dated.....for the supply of goods/works indicated hereunder and/or further specified in the annexure(s).
5. An official order indicating delivery instructions is forthcoming.
6. I undertake to make payment for the goods/works delivered in accordance with the terms and conditions of the contract, within 30 (thirty) days after receipt of an invoice accompanied by the delivery note.

| ITEM | PRICE<br>(ALL APPLICABLE<br>TAXES INCLUDED) | BRAND | DELIVERY PERIOD | B-BBEE STATUS<br>LEVEL OF<br>CONTRIBUTION |
|------|---|-------|-----------------|---|
|      |   |       |                 |   |

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

SIGNED AT .....ON.....

NAME (PRINT) .....

SIGNATURE .....

OFFICIAL STAMP

WITNESSES

33. ....

34. ....

DATE .....

WITNESSES