



TENDER DATA

1.	The Employer is: Thembisile Hani Local Municipality Private Bag X 4041 Empumalanga 0458			
2.	Tender Documents			
	<p>Tendering Procedures Tender notice and invitation to tender Tender data</p> <p>Returnable Documents List of Returnable Documents</p> <p>The Contract Agreements and Contract data Forms of Offer and Acceptance Contract Data</p> <p>Pricing Data Pricing Instruction Bill of Quantities</p> <p>Terms of Reference Terms of Reference</p> <p>Additional Relevant Documents Supply Chain Management Policy</p>			
3.	<p>Interpretation</p> <p>The tender data and additional requirements contained in the tender schedules that are included in the returnable documents are deemed to be part of these tender conditions.</p>			
4	<p>Communication.</p> <p>The Employer's Representative is;</p> <table><tr><td><p><u>Accounting Officer;</u> ON Nkosi Private Bag X 4041 Empumalanga 0458 Tel: 013 986 9100</p></td><td><p><u>Procurement Eng.</u> Supply Chain Unit Private Bag X 4041 Empumalanga 0458 Tel: 013 986 9187</p></td><td><p><u>Technical Enquiries.</u> R Makhubele Private Bag X 4041 Empumalanga 0458 Tel : 013 986 9198</p></td></tr></table>	<p><u>Accounting Officer;</u> ON Nkosi Private Bag X 4041 Empumalanga 0458 Tel: 013 986 9100</p>	<p><u>Procurement Eng.</u> Supply Chain Unit Private Bag X 4041 Empumalanga 0458 Tel: 013 986 9187</p>	<p><u>Technical Enquiries.</u> R Makhubele Private Bag X 4041 Empumalanga 0458 Tel : 013 986 9198</p>
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4.1	Attention is drawn to the fact that verbal communication given by the Employer's representative prior to the close of tenders will not be regarded as binding on the employer. Only information issued formally by the employer in writing to the tenders, under the signature of the Accounting Officer will be regarded as amending the tender documents.			
4.2	<p>Eligibility Criteria and Requirements</p> <p>Only those tenderers who satisfy the following eligibility criteria are eligible to submit tenders:</p>			



1. Tenderer is registered on the Central Supplier Database
2. Tenderer is qualified and professionally registered for the service to be provided
3. Tenderer has the managerial capacity, reliability and experience regarding the nature of the project

Only those tenderers who score a minimum score of **60 points** in respect of the following functionality criteria will proceed to the price and preference goals.

Summary of Functionality	
Professional service team	20
Company track record	20
Methodology	40
Total	80

5 The Employer's right to accept or reject any tender offer

The employer has the right not to accept the lowest tender and to accept the whole or part of any tender or not to consider any tender not suitably endorsed is fully reserved by the Thembisile Hani Local Municipality.

6 Tenderer Obligations

6.1 The Council retains the right to call for any additional information that it may deem necessary

6.2 If tendering as a Joint Venture, Joint venture must be constituted by means of a comprehensive and fair, written agreement between the members, which sets out their obligations, rights, risks and rewards.
Joint venture members should share at least the following aspects of the joint venture activities in a meaningful and equitable manner:

1. Control
2. Management
3. Operations
4. Risk
5. Profit and Loss

6.3 If a Tenderer , or any person employed by him is found to have either directly or indirectly, promised or given to any person in the employment of Council, any commission, gratuity, gift or other consideration, The Council shall have the right to summarily and without recourse to law and without prejudice to any other legal remedy which it may have in regard to any loss and/ or additional costs or expenses, to disqualify the Tender or cancel the Contract without paying any compensation to the aforesaid Tender or Contract.

6.4 At the request of the Municipal Manager or his authorised representative from furnishing him with additional information, or with a sample or specimen for testing purposes or otherwise, or from giving a demonstration so as to enable the recommendation to the Council's responsible Committee on the award of the contract be formulated,



7.	Proof of warrantee None
8	Compensation of tendering The employer will not compensate the tenderer for any costs incurred in the preparation and submission of a tender offer, including the cost of any testing necessary to demonstrate that aspects of the offer satisfy requirements.
9	Check documents The Tenderer should check the tender documents on receipt for completeness and notify the employer of any discrepancy or omission.
10.1	Confidentiality and Copyright of Documents. Treat as confidential all matters arising in connection with the tender. Use and copy the documents issued by the employer only for the purpose of preparing and submitting a tender offer in response to the invitation
10.2	Clarification Meeting Prospective bidders should take note that there will be non-compulsory briefing session
11	Submitting tender offer:
11.1	No Tender document will be considered unless submitted on Council's Official Tender Document
11.2	Return all the returnable documents to the employer after completing them.
11.3	The employer's address for delivery of tender offers and identification details to be shown on such tender offer package are: Location of tender box: Thembisile Hani Local Municipality Physical address : Stand no 24, Corner Police Station Kwaggafotein C , Empumalanga Telephonic, telegraphic, telex, facsimile or emailed tenders will not be considered
11.4	All tender received by the Thembisile Hani Local Municipality will remain in the Municipality's possession until after the stipulated closing date and time.
11.5	Accept that a tender submitted to the employer cannot be withdrawn or substituted. No substitute tenders will be considered



12.	Closing Time:
12.1	<p>The time and location for opening of the Tender offers are:</p> <p>Closing Time: 12:00 Closing Date: 14 December 2023 Location: Thembisile Hani Local Municipality Stand No. 24 Corner Police Station Kwaggafontein C Empumalanga 0458</p>
12.2	<p>After the opening of the tender proposals, no information relating to the clarification, determination of responsiveness, evaluation and comparison of tender proposals and recommendations concerning the award of the tender shall be disclosed to any other tenderer or persons not concerned with such process until the award of the Tender has been announced by the THLM.</p>
13.	<p>Pricing the tender</p> <p>State the rates and prices in Rand</p> <p>NB: Should exchange rates and price fluctuations, bidders affect prices should take forward cover and this be incorporated in the price tendered.</p>
14.	<p>Alterations to the Tender Documents.</p> <p>No alterations may be made to the tender document issued by the employer.</p> <p>Proposals and any other supporting documents must be attached to the back of this tender document</p>
15	<p>Alternative tender offer.</p> <p>No alternative tender offers will be considered or accepted</p> <p>Alternative offers may be submitted only if a main tender offer, strictly in accordance with all the requirements of the tender document is also submitted. The alternative tender offer is to be submitted with the main tender offer together with a schedule that compares the requirements of the tender document with the alternative requirements the tenderer proposes.</p>
16	<p>Tender Offer Validity</p> <p>The Tender offer validity period is 120 days from the closing date.</p>
17	<p>Tender clarification after submission</p> <p>A tender will not be regarded as non-responsive if the tenderer fails to requested by the employer within the time for submission stated in the employer's written request.</p>
18	Tender evaluation points
18.1	<p>The value of this bid is estimated not to exceed R50 000 000 (all applicable taxes included) and therefore the 80/20 system shall be applicable.</p>
18.2	<p>Preference points for this bid shall be awarded for:</p> <p>(a) Price; and (b) Specific goals</p>



18.3	<p>The maximum points for this bid are allocated as follows:</p> <table border="1"> <tr> <td></td><td>POINTS</td></tr> <tr> <td>PRICE</td><td>80</td></tr> <tr> <td>Specific goals</td><td>20</td></tr> <tr> <td>Total points for Price and specific goals must not exceed</td><td>100</td></tr> </table>		POINTS	PRICE	80	Specific goals	20	Total points for Price and specific goals must not exceed	100				
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19.	<p>Evaluation of Tenders</p> <p>The Tenderers notice is drawn to the fact that the evaluation, adjudication and awarding of this tender will be in terms of the Supply Chain Management Policy of the THLM.</p>												
19.1	<p>The following steps will be followed in evaluation;</p> <ol style="list-style-type: none"> 1. Determination of whether or not tender offers are complete. 2. Determination of whether or not tender offers are responsive. 3. Determination of the reasonableness of tender offers. 4. Confirmation of the eligibility of preferential points claimed by tenderers. 5. Awarding of points for financial offer. 6. Ranking of tenderers according to the total points 7. Performance of risk analysis by checking the credit record of the tenderers 												
19.2	<p>Evaluation Criteria</p> <p>The procedure for the evaluation of responsive Bids will be on the average of the previous three projects where the firm was involved</p> <table border="1"> <tr> <td align="center" colspan="2">The tenders shall be considered for further evaluation when they score 60 points out of 80 points.</td></tr> <tr> <td align="center" colspan="2">Summary of Functionality</td></tr> <tr> <td>Professional service team</td><td align="center">20</td></tr> <tr> <td>Company track record</td><td align="center">20</td></tr> <tr> <td>Methodology</td><td align="center">40</td></tr> <tr> <td>Total</td><td align="center">80</td></tr> </table>	The tenders shall be considered for further evaluation when they score 60 points out of 80 points.		Summary of Functionality		Professional service team	20	Company track record	20	Methodology	40	Total	80
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	<p>Tenders are adjudicated in terms of THLM Supply Chain Management Policy, and the following framework is provided as a guideline in this regard.</p>												
19.3.1	<p>Technical adjudication and General Criteria</p> <ul style="list-style-type: none"> ▪ Tenders will be adjudicated in terms of inter alia: ▪ Compliance with Tender conditions ▪ Technical specifications <p>If the Tenderer does not comply with the Tender Conditions, the Tenderer may be rejected. If technical specifications are not met, the Tender may also be rejected.</p> <p>With regard to the above, certain actions or errors are unacceptable and warrants</p>												



	<p>REJECTION OF THE TENDER, for example</p> <ul style="list-style-type: none"> ▪ Pages to be completed, removed from the Tender document, and have therefore not been submitted. ▪ If tender document is not fully completed as required and as stipulated in the tender data. ▪ If any tender document is tempered with or it is unbundled or unbundled. ▪ Failure to complete the schedule of quantities as required – only lump sums provided. ▪ Scratching out without initialling next to the amended rates or information. ▪ Writing over / painting out rates / the use of tippex or any erasable ink, e.g. pencil. ▪ Failure to attend compulsory site inspections ▪ The Tender has not been properly signed by a party having the authority to do so, according to the Form D – “Authority for Signatory” ▪ A Resolution by a Board of Directors of the Company authorizing the Tenderer to sign the Tender document on behalf of the Company. No authority for signatory submitted. ▪ Particulars required in respect of the Tender have not been provided – non-compliance of Tender requirements and/or specifications. ▪ The Tenderer’s attempts to influence, or has in fact influenced the evaluation and/or awarding of the contract. ▪ The Tender has been submitted after the relevant closing date and time ▪ Failure to complete and sign Form C1.1 Form of Offer and Acceptance ▪ If any municipal rates and taxes or municipal service charges owed by that Tenderer or any of its directors to the municipality, or to any other municipality or municipal entity, are in arrears for more than three months. ▪ If any Tenderer who during the last five years has failed to perform satisfactorily on a previous contract with the municipality or any other organ of state after written notice was given to that Tenderer that performance was unsatisfactory. ▪ Tax Clearance Certificate / Tax Compliance Status documents with Pin. ▪ Each company within the Joint Venture / Consortium must submit Tax Clearance Certificate or a copy of Tax Compliance Status document with Pin ▪ Certified copies of directors ID. ▪ Copy of company registration documents. ▪ Copy of latest municipal account which is not more than 3 months old at the time of closing. ▪ The bidding entity as well as all its directors must submit Municipal account which is not more than three (3) months in arrears or valid lease agreement which is in the name of the business and or the directors, which must stipulate the responsibility of payment of municipal services. ▪ Central Supplier Database (CSD) registration summary report ▪ Completed and Signed Schedule of Quantities
19.3.2	<p>Size of enterprise and current workload</p> <ul style="list-style-type: none"> ▪ Evaluation of the Tenderer’s position in terms of: ▪ Previous and expected current annual turnover ▪ Current contractual obligations ▪ Capacity to execute the contract
19.3.3	<p>Staffing profile</p>



	<p>Evaluation of the Tenderer's position in terms of:</p> <ul style="list-style-type: none"> ▪ Staff available for this contract being Tendered for ▪ Qualifications and experience of key staff to be utilised on this contract.
19.3.4	<p>Proposed Key Personnel</p> <p>In this part of the tender, the Tenderer shall also supply Curriculum Vitae (CV's) for the Staff available named and working on full time basis for the Tenderer. The CV should follow the normal Professional Format as used by Professional Service Providers.</p> <p>Each CV should give at least the following:</p> <ul style="list-style-type: none"> ○ Position in the firm and within the organisation of this assignment ○ PDI status (describing population group, gender and disabilities) ○ Educational qualifications ○ Professional Registrations ○ Relevant experience (actual duties performed, involvement and responsibility), including locations, dates and durations of assignments, starting with the latest. ○ Language proficiency and ○ References (company name, individual name, position held, contact details) <p>Much importance will be placed on the experience of the staff proposed. The Tender must ensure that, if selected, the nominated staff will be assigned as proposed. Failure to do so may result in the annulment of any acceptance of the Tenders' proposal and/ or Agreement entered into by the Client for the execution of the services</p>
19.3.5	<p>Previous experience</p> <p>The procedure for the evaluation of responsive Bids will be on the average of the previous three projects where the firm was involved</p> <p>The tenderer shall list in the appropriate Forms the appropriate related projects undertaken by the member firms of the tenderer within the last five (5) years.</p> <p>Evaluation of the Tenderer's position in terms of his previous experience. Emphasis will be placed on the following:</p> <ul style="list-style-type: none"> ▪ Experience in the relevant technical field ▪ Experience of contracts of similar size ▪ Some or all of the references will be contacted to obtain their input.
19.3.6	<p>The tenderer shall provide documentation of company experience of each member of the Consortium/Joint Venture related projects.</p>
19.3.7	<p>Financial ability to execute the contract:</p> <p>Evaluation of the Tenderer's financial ability to execute the contract. Emphasis will be placed on the following:</p> <ul style="list-style-type: none"> ▪ Proof of warrantee



	<ul style="list-style-type: none"> ▪ Contact the Tender's bank manager to assess the Tenderer's financial ability to execute the contract and the Tenderer hereby grants his consent for this purpose.
19.3.8	Good standing with SA Revenue Services <ul style="list-style-type: none"> ▪ Determine whether an original valid tax clearance certificate has been submitted. ▪ The Tenderer must affix a valid Tax Clearance Certificate
19.3.9	<p>If the Tender does not meet the requirements contained in the THLM Procurement Policy, and the mentioned framework, it will be rejected by the Council, and may not subsequently be made acceptable by correction or withdrawal of the non-conforming deviation or reservation</p>
19.3.10	Penalties <p>The Thembisile Hani Local Municipality will if upon investigation it is found that a preference in terms of the Act and these regulations has been obtained on a fraudulent basis, or any specified goals are not attained in the performance of the contract, on discretion of the Municipal Manager, one or more of the following penalties will be imposed:</p> <ul style="list-style-type: none"> ▪ Cancel the contract and recover all losses or damages incurred or sustained from the Tenderer. ▪ Impose a financial penalty at the discretion of Council ▪ Restrict the contractor, its shareholders and directors on obtaining any business from the Thembisile Hani Local Municipality for a period of 5 years
20	The additional conditions of Tender are: <p>1 Thembisile Hani Local Municipality may also request that the Tenderer provide written evidence that his financial, labour and resources are adequate for carrying out the project.</p> <p>2 The Thembisile Hani Local Municipality reserves the right to appoint a firm of chartered accountants and auditors and / or execute any other financial investigations on the financial resources of any Tenderer. The Tenderer shall provide all reasonable assistance in such investigations.</p>



Tender Compliance by the Contracting Firm

It must be noted that a total of **55 points** must be obtained by the Contracting Firm in relation to the requirements as mentioned on the table below failure which a tender shall be automatically eliminated from any further evaluation.

Evaluation Criteria	Evaluation Criteria	Elimination Factor	Points obtainable	Points Claimed
Delegation of Authority (Note 01)	Delegation of Authority for Signatory signed by Senior Directors and/or Shareholders nominating representative on the project	Yes	5	
Completing tender document (Note 02)	Must initial every page in the tender document, signing and fill the tender document in full	Yes	5	
Company registration (Note 03)	Proof of Company Registration with Company Intellectual Property Registration Office (CIPRO) and proof of shareholding	Yes	5	
Tax Clearance Verification Pin (Note 04)	Proof of Tax Registration Verification Pin and Compliance with South African Revenue Service (SARS) must be submitted	Yes	5	
Municipal Account (Note 05)	A statement of the municipal account which does not owe municipal services for more than 90 days must be attached.	Yes	5	
Bank Confirmation Letter (Note 06)	A proof in the form bank stamped letter from the bank not older than three (3) months confirming the bank account and details.	Yes	5	
CSD Report (Note 07)	A copy of CSD report of the company which is not older than 1 (one) month must be attached.	Yes	5	
Regulatory body - Financial Sector Conduct Authority (FSCA) (Note 08)	A copy of a valid Financial Sector Conduct Authority (FSCA) certificate must be attached.	Yes	5	
Regulatory body - The Institute of Risk Management South Africa (IRMSA) (Note 9)	Proof of active membership with The Institute of Risk Management South Africa must be attached	Yes	5	
Regulatory body – Financial Intermediaries Association of South Africa (Note 10)	Proof of active membership with the Financial Intermediaries Association of South Africa (FIA) must be attached.	Yes	5	
Professional Indemnity Cover (Note 11)	Proof of Professional Indemnity cover of R30 million minimum must be attached.	Yes	5	
Maximum 55 points				

Note 01: Delegation of Authority



In case of a Company, a delegation of Authority signed by the Consulting Firm's Board of Directors nominating a Team Leader as a delegated and authorized Signatory must be attached. In case of a Closed Corporation, a delegation of Authority signed by the Contracting Firm's majority Shareholders nominating a Team Leader as a delegated and authorized Signatory must be attached. Failure to attach the certificate shall warrant an automatic elimination of tender from any further evaluation.

Note 02: Completing tender document

As stipulated in the tender rules or in addition thereto, a tender document shall be completed in full with all the provided spaces signed, every page initialled accordingly and required documentation attached. Failure, which shall warrant an automatic elimination of tender from any further evaluation.

Note 03: Company registration

A proof of company registration in the form of a copy from Company Intellectual Property Registration Office (CIPRO) shall be attached including a copy of a certificate for proof of shareholding. Failure to attach the certificate shall warrant an automatic elimination of tender from any further evaluation.

Note 04: Tax Verification Pin

A copy of tax registration and compliance (**Tax PIN**) with relevant SARS in the form of a valid verification PIN certificate shall be attached. Failure to attach the certificate shall warrant an automatic elimination of tender from any further evaluation.

Note 05: Municipal Account

Attach an original or a copy of a municipal utility account (not older than three (03) months) and the account must be in arrears for more 90 days of any of the registered Director(s) or Company. Attach a copy of the lease agreement along with the utility account of the Landlord, whereby the company is leasing the property it is operating from. Failure to attach the required documents shall warrant an automatic elimination of tender from any further evaluation.

Note 06: Bank Confirmation Letter

Attach a proof in the form bank stamped letter from the bank not older than three (3) months confirming the bank account and details. Failure to attach the certificate shall warrant an automatic elimination of tender from any further evaluation.

Note 07: CSD Report

Attach a copy of CSD report of the company which is not older than one (01) month must be attached. Failure to attach the certificate shall warrant an automatic elimination of tender from any further evaluation

Note 08: Regulatory body – Financial Sector Conduct Authority (FSCA)

Attach a copy of proof of valid membership with the Financial Sector Conduct Authority (FSCA), a certificate must be attached. Failure to attach the report shall warrant an automatic elimination of tender from any further evaluation



Note 9: Affiliation certificates belonging to professional body - The Institute of Risk Management South Africa (IRMSA)

Attach valid proof of affiliation with The Institute of Risk Management South Africa (IRMSA) professional body. Failure to attach the report shall warrant an automatic elimination of tender from any further evaluation

Note 10: Affiliation certificates belonging to professional body - Financial Intermediaries Association of South Africa

Attach valid proof of affiliation with the Financial Intermediaries Association of South Africa (FIA). Failure to attach FIA certificate shall warrant an automatic elimination of tender from any further evaluation.

Note 11: Professional Indemnity (PI)

Attach valid proof of Professional Indemnity with a minimum amount of R30 million. Failure to submit the PI shall warrant an automatic elimination of tender from any further evaluation

The undersigned, who warrants that he / she is duly authorised to do so on behalf of the enterprise, confirms that the contents of this schedule are within my personal knowledge and are to the best of my belief both true and correct.

Person Authorized to sign Tender:

FULL NAME:

.....

SIGNATURE: DATE:



FORM EVALUATION SCHEDULE: PERSONNEL AND PREVIOUS RELATED WORK EXPERIENCE

The Firm's tender responsiveness in relation to points is therefore summarized as follows:

Summary of Functionality	
Professional service team	20
Company track record	20
Methodology	40
Total	80

A firm must obtain a minimum of 60 points out of the 80 points above to be considered for price and specific goals.

PROFESSIONAL SERVICE TEAM (Maximum points obtainable 40)

Evaluation criteria	Minimum required	Maximum points obtainable	Points claimed
Professional services team		20 points	
ACCOUNTANTS EXECUTIVE		10 points	
Insurance Broker experience	0 – 3 Years	3	
	4 -6 Years	6	
	7 Years and more	10	
Sub-total: Accounts Executive insurance brokerage experience :		10	
CLAIMS ADMINISTRATOR		10	
Insurance Broker experience	0 – 2 years	3	
	2 – 3 years	8	
	4 Years and more	10	
Sub-total: Claims administrator insurance brokerage experience		10	
Total:		20	



B. COMPANY TRACK RECORD

Evaluation criteria	Minimum requirements/description	Maximum points obtainable	Points claimed
Company track record: Insurance Brokerage Services		20	
Companies Experience in Insurance Brokerage services (public and private sector)	3 Clients	2	
	4 Clients	5	
	5 Clients	10	
	6 and more Clients	20	
Sub-total: Company track record in insurance brokerage services		20	
TOTAL: COMPANY TRACK RECORD		20	

C. METHODOLOGY

Evaluation criteria	Maximum points obtainable	Points claimed
Methodology	40	
The methodology presented is unlikely to lead to achievement of the project objectives and/or: <ul style="list-style-type: none"> • Reporting • Meeting • Advice • Take into consideration project risks, timelines or other important considerations 	10 10 10 10	
TOTAL: METHODOLOGY	40	

TOTAL SCORE: _____/80