



WITZENBERG

Municipality • Munisipaliteit • UMasipala Wase

Reference/ Verwysing/ iRef: 08/2/14/23
Enquiries/ Navrae/ Imibuzo: MG Frieslaar

17 November 2016

TO WHOM IT MAY CONCERN

Dear Sir/ Madam

REQUEST FOR FORMAL WRITTEN PRICE QUOTATIONS:

(Over R30 000.00 up to a transaction value of R200 000.00 VAT included)

Kindly furnish us with a written quotation for the supply of the following:

FACILITATION OF MUNICIPAL ANNUAL MEDICAL ASSESSMENTS.

This bid document must be placed in a sealed envelope. The following particulars must appear on the outside of the envelope: **"08/2/14/23: FACILITATION OF MUNICIPAL ANNUAL MEDICAL ASSESSMENTS."**, the name and address of the bidder and the closing date of this bid. The sealed envelope must be put in the bid box located at the entrance of the Witzenberg Municipal Head Office, 50 Voortrekker Street, Ceres by no later than **MONDAY, 05 December 2016 at 12:00**. The bid box is generally open 24 hours a day, 7 days a week. Telephonic, facsimile, electronic/ e-mailed and late bids will not be accepted. Bids may only be submitted on the bid documentation as provided by the municipality.

The following conditions will apply

- Price(s) quoted must be valid for at least sixty (60) days from date of your offer.
- Price(s) quoted must be firm and must be inclusive of VAT.
- A firm delivery period must be indicated.
- This quotation will be evaluated in terms of the 80/20 preference point system.
- The bids are subject to **the revised Preferential Procurement Regulations, 2011 in Government Gazette No 34350**. These conditions are available on request.
- The successful provider will be the one scoring the highest points.
- Payments to the successful bidder in terms of this contract will be processed within 30 days after receipt of a valid tax invoice for goods and/or services rendered to the satisfaction of the municipality.
- The checklist at the back of the bid document must be completed and adhered to.

NB: No quotations will be considered from persons in the service of the state as defined in Regulation 1 of the Local Government: Municipal Supply Chain Management Regulations dated 30 May 2005)

Failure to comply with these conditions may invalidate your offer.

Yours faithfully

**D NASSON
MUNICIPAL MANAGER**

REQUEST FOR A FORMAL WRITTEN PRICE QUOTATION

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE WITZENBERG MUNICIPALITY

BID NUMBER: 08/2/14/23

CLOSING DATE: 05 DECEMBER 2016

CLOSING TIME: 12:00

DESCRIPTION: FACILITATION OF MUNICIPAL ANNUAL MEDICAL ASSESSMENTS.

The following conditions to bid exist:

(Failure to comply may result in your bid being disqualified)

1. Bidders should ensure that bids are delivered timeously to the correct address as indicated below. If the bid is late, it will not be accepted for consideration. The bid box is generally open 24 hours a day, 7 days a week. **Telephonic, facsimile, electronic/mailed and late bids will not be accepted.**
2. All prices must include VAT.
3. Bids will be evaluated according to the 80/20 points system as stipulated in **the revised Preferential Procurement Regulations, 2011 in Government Gazette No 34350.**
4. An original or certified copy of the bidder's Broad-Based Black Economic Empowerment (B-BBEE) certificate must be attached to this bid document in order to claim B-BBEE points. **Bidders who are registered on the municipality's accredited supplier database and submitted an original or certified copy of their B-BBEE certificate with their application form do not need to submit it with this bid document, provided that the certificate is valid at the time of bid closing. However, the onus is on the bidder to confirm this with the Supply Chain Unit.**
5. Bid documents can be obtained during office hours from Monday to Thursday: 8h30 -13h00 and 13h45 - 15h30 and Fridays: 8h30 – 13h00 and 14h00 – 14h30 from the Witzenberg Municipality, Supply Chain Unit, Drommedaris Street, Ceres at a cost of R 30.00 per set. The bid documents are also available on our website at <http://www.witzenberg.gov.za/tenders/new-tender/>
6. The bids will be opened in the Council Chambers, Municipal Offices, 50 Voortrekker Street, Ceres in public immediately after the closing time at 12:00.
7. The bid must be properly received in a sealed envelope which must clearly indicate the description of the bid, the bid number and the name and postal address of the bidder on the outside of the sealed envelope. Unmarked bids will not be taken into consideration and will be returned.
8. The lowest or any bid shall not necessarily be accepted and the Municipality reserves the right to accept any part of the bid.
9. **An original and valid tax clearance certificate must be attached to this bid document. Bidders who are registered on the municipality's accredited supplier database and submitted an original and valid tax clearance certificate with their application form do not need to submit it again with this bid, provided that the original tax clearance certificate will be valid at the time of bid closing. However, the onus is on the bidder to confirm this with the Supply Chain Unit.**
10. Do not dismember this Bid Document (do not take it apart or put documents between its pages).
11. All other documents of the submission must be **attached behind** this bid document.
12. The bidder must complete the checklist at the back of this bid document.
13. **Please note that any suspicious collusive bidding behaviour and restrictive practices by bidders will be reported to the Competition Commission for investigation and possible imposition of administrative penalties.**

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 27636 DATED 30 MAY 2005)

SUBMISSION DETAILS

SUBMISSION OF BID DOCUMENTS:

TO BE DEPOSITED IN:

The bid box at the entrance of the Municipal Offices of Witzenberg Municipality
50 VOORTREKKER STREET, CERES

CONTACT DETAILS FOR ENQUIRIES:

Ms S Mentor Tel: (023) 312-1761: Email: shayle@witzenberg.gov.za

D NASSON
MUNICIPAL MANAGER

**WITZENBERG MUNICIPALITY
TERMS OF REFERENCE (TOR)**

1. SCOPE

1.1 Purpose

Bids are hereby invited for the **Facilitation of Municipal Annual Medical Assessments** for approximately 100 employees.

1.2 Background and description of project

Witzenberg Municipality includes the towns and rural areas of:

- Ceres,
- Prince Alfred's Hamlet,
- Op-die-Berg,
- Tulbagh, and
- Wolseley

1.3 Pre-qualification criteria

1.3.1 Bids must be accompanied by valid proof of registration with the HPCSA (Health Practitioners Council of South Africa). Failure to submit the aforementioned document may invalidate the bidder's application.

1.3.2 Bids must be accompanied by valid proof of qualification for Occupational Health Nurse or Doctor. Failure to submit the aforementioned document will invalidate the bidder's application.

1.3.3 Bidder must have successfully completed at least 1 project of a similar size and scale during the past 3 years. Bidders must complete a table on page 4 of this bid document indicating their current/ previous experience.

1.3.4 Bidder must have at least 5 years' experience as an occupational medical service provider. (Proof thereof must be attached)

1.4 Special Condition of Contract

1.4.1 In terms of service delivery, the assessments have to take place in groups preferably 4 groups of 25 employees per group.

1.4.2 The Bid Price must stay fixed for the period of Assessments.

1.4.3 Successful bidder will have 30 calendar days from date of official order to initiate medical assessments.

1.4.4 Consent & Confidentiality – The health record should not include confidential clinical data but should include the conclusions of the doctor. The doctor must ensure that the employee understands what is to be disclosed, the reasons for disclosure and the consequences.

2. EVALUATION CRITERIA

This bid will be evaluated according to the criteria and weight given in the table below:

Evaluation Criteria	Weighting
2.1 Price	80
2.2 B-BBEE in terms of Preferential Procurement Regulations of 2011 (form MBD 6.1)	20
Total	100

2.3 Bids will be evaluated and awarded as a whole.

3. SCHEDULE: PREVIOUS EXPERIENCE

Indication of Competence / Ability to Perform Successfully

List of recent previous work of a similar nature undertaken by the firm

Description of Project	Client contact details			Value of Contract	*Year Completed / Not On-going
	Name of Client	Name of Responsible Official	Telephone no		

* Only projects that have been **completed** will be used for evaluation purposes and **not current** or **on-going** projects.

The Witzenberg Municipality will verify all information submitted in terms of this bid and any information that is incorrect will result in that bid being automatically disqualified and not considered further. Therefore it is stressed that the contact firm or person of the bidder must be willing to confirm the information in writing on the request by the Municipality.

Signed at on thisday of 20.....

As Witnesses: 1).....

2).....

08/2/14/23: FACILITATION OF MUNICIPAL ANNUAL MEDICAL ASSESSMENTS

The following specifications must be complied with and clearly marked to serve as confirmation:

(Non-compliance to the specifications will invalidate the offer)

No.	Description	Compliance to specifications, mark X in YES column, if not X in NO column		
		YES	NO	If compliant but slightly deviate: State deviation. (If not sufficient space, attached annexure of deviation)
1.	Annual Medical Assessment will include the following Health Testing:			
1.1	Audiometric Screening (This is a full examination to report percentage hearing loss)			
1.2	General Health (Visual screening, Vital Signs, Blood Pressure, Blood Glucose), skeletal tests			
1.3	Urine analysis (Liver / Kidney diseases)			
1.4	Spirometry Testing			
1.5	TB Testing			
1.6	Screening for Hepatitis B			
2.	Travelling and accommodation of the Service Provider:			
2.1	The service provider will be responsible for their own travelling and accommodation costs or be included in their bid prices.			
3.	Venue:			
3.1	Assessments to be done at a suitable Witzenberg Municipal Premises or a suitable venue in the Witzenberg Municipal area otherwise agreed upon between the Municipality and the Service Provider.			
4.	General:			
4.1	Detailed costing of the services to be rendered for 100 employees.			
4.2	A project plan based on achievable and realistic timeframes.			
4.3	Medical Assessments must take place during working hours (from 08:00 am to 17h00 pm).			
4.4	Full Individual Medical Assessment report on each of the 100 employees.			

The Bidder hereby confirms that the information given above is true and correct:

.....
(Name in Print)

.....
(Signature)

.....
(Capacity)

.....
(Date)

DETAILS OF BIDDER (THE FOLLOWING PARTICULARS MUST BE FURNISHED. FAILURE TO DO SO MAY RESULT IN YOUR BID BEING DISQUALIFIED)

Name of firm / entity / enterprise	
Trading as (if different from above)	
Postal address	
Physical address	
Contact Details of the Person Signing the Bid:	Name: _____ Telephone: _____ Fax: _____ Cellular Telephone: _____ e-mail address: _____
Contact Details of the Senior Manager Responsible for Overseeing Contract Performance:	Name: _____ Telephone: _____ Fax: _____ Cellular Telephone: _____ e-mail address: _____
Contact Details of the Bidder's proposed Project Manager who will represent the Bidder in the implementation processes:	Name: _____ Telephone: _____ Fax: _____ Cellular Telephone: _____ E-mail address: _____
Company Income Tax no.	
VAT registration no.	
Company registration no.	
Any other Registration applicable to this Industry	
Bidder's banking details	Name of account holder: _____ Name of Bank: _____ Bank Account Number: _____ Branch Code: _____

THE FOLLOWING MUST BE COMPLETED BY THE BIDDER (please tick the applicable box):

1. Has an **original and valid** tax clearance certificate been attached? (MBD 2) **YES** / **NO**
2. Has a **certified copy** B- BBEE status level verification certificate been submitted? (MBD 6.1) **YES** / **NO**

(a) If yes, who was the certificate issued by?

- (i) An accounting officer as contemplated in the Close Corporation Act (CCA)
- (ii) A verification agency accredited by the South African National Accreditation System (SANAS)
- (iii) A Registered Auditor

AN ORIGINAL OR CERTIFIED B- BBEE STATUS LEVEL VERIFICATION CERTIFICATE MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B- BBEE.

3. Are you the accredited representative in South Africa for the goods/services/works offered? **YES** / **NO**

(a) If yes, please attach proof

TAX CLEARANCE CERTIFICATE REQUIREMENTS

It is a condition of bid 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.

1. In order to meet this requirement bidders are required to complete in full a TCC 001 form "Application for a Tax Clearance Certificate" and submit it to any SARS branch office nationally. The Tax Clearance Certificate Requirements are also applicable to foreign bidders/ individuals who wish to submit bids.
2. SARS will then furnish the bidder with a Tax Clearance Certificate that will be valid for a period of 1 (one) year from the date of approval.
3. The original Tax Clearance Certificate must be submitted together with the bid. Failure to submit the original and valid Tax Clearance Certificate will result in the invalidation of the bid. Certified copies of the Tax Clearance Certificate will not be acceptable.
4. In bids where Consortia / Joint Ventures/ Sub-contractors are involved, each party must submit a separate Tax Clearance Certificate.
5. Copies of the TCC 001 "Application for a Tax Clearance Certificate" form are available from any SARS branch office nationally or on the website www.sars.gov.za.
6. 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.

**PRICING SCHEDULE – FIRM PRICES
(PURCHASES)**

NOTE: ONLY FIRM PRICES WILL BE ACCEPTED. NON- FIRM PRICES (INCLUDING PRICES SUBJECT TO RATES OF EXCHANGE VARIATIONS) WILL NOT BE CONSIDERED

Name of Bidder:	Bid Number: 08/2/14/23
Closing Time: 12:00	Closing Date: 05 December 2016

OFFER MUST BE VALID FOR 90 DAYS FROM THE CLOSING DATE OF BID.

ITEM NO.	DESCRIPTION	ESTIMATED EMPLOYEES	UNIT PRICE PER EMPLOYEE (incl. VAT)	TOTAL PRICE (Incl. VAT)
1.	Facilitation Of Municipal Annual Medical Assessments	100		

The quantities as indicated in the pricing schedule are only estimated quantities which will be used in order to evaluate the bid.

Required by: Ms I Swartboo

At: 50 Voortrekker Street, Ceres, 6835

Does offer comply with specification? *YES/NO

If not to specification, indicate deviation(s)

Period required for delivery **Respond to assessments within 30 calendar days.**

Delivery: *Firm/not firm

Delivery Period:calendar days.

Note: All delivery costs must be included in the bid price.

VALUE ADDED TAX

The following forms part of the General Conditions of Contract (July 2010):

Where the value of an intended contract will exceed R1 000 000, 00 (R1 million) it is the bidder's responsibility to be registered with the South African Revenue Service (SARS) for VAT purposes in order to be able to issue tax invoices.

It is a requirement of this contract that the amount of value-added tax (VAT) must be shown clearly on each invoice.

The amended Value-Added Tax Act requires that a Tax Invoice for supplies in excess of R3 000 should, in addition to the other required information, also disclose the VAT registration number of the recipient, with effect from 1 March 2005.

The VAT registration number of the Witzenberg Municipality is **4000-846-206**.

DECLARATION OF INTEREST

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

3 In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

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

3.2 Identity Number:

3.3 Position occupied in the Company (director, trustee, shareholder²):.....

3.4 Company Registration Number:

3.5 Tax Reference Number:.....

3.6 VAT Registration Number:

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

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

3.8.1 If yes, furnish particulars.

.....

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

3.9.1 If yes, furnish particulars.....

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

3.10.1 If yes, furnish particulars.

.....

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

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

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

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

3.11.1 If yes, furnish particulars

.....

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

3.12.1 If yes, furnish particulars.

.....

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

3.13.1 If yes, furnish particulars.

.....

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

3.14.1 If yes, furnish particulars:

.....

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

Full Name	Identity Number	Personal income tax reference number	State Employee Number

.....
Signature

.....
Date

.....
Capacity

.....
Name of Bidder

RESPONSIVENESS AND EVALUATION CRITERIA

NB: Witzenberg Municipality may verify any information submitted in terms of this document and any information that is incorrect may result in the bid being automatically disqualified and not considered further.

RESPONSIVENESS CRITERIA

No bid will be considered by Witzenberg Municipality unless it meets the following responsiveness criteria (for the bid to be considered responsive, the bid **must** meet the following requirements):

- a) The bid must be properly received in a sealed envelope. The outside of the envelope must clearly indicate the bid title, the bid number, the name and address of the bidder and the closing date of the bid.
- b) The bid must be deposited in the relevant bid box as indicated on the notice of the bid on or before the closing date and time of the bid. **Telephonic, facsimile, electronic/ emailed and late bids will not be accepted.**
- c) An original Valid Tax Clearance Certificate must be attached to the bid document. **Bidders who are registered on the municipality's accredited supplier database and submitted an original and valid tax clearance certificate with their application form do not need to submit it again with this bid, provided that the original tax clearance certificate will be valid at the time of bid closing. However, the onus is on the bidder to confirm this with the Supply Chain Unit.**
- d) Bids shall be invalid, and shall be endorsed and recorded as such in the bid opening record by the responsible official to open the bid, in the following instances:
 1. If the bid is not sealed;
 2. if the bid including the bid price amount, where applicable is not submitted on the official pricing schedule;
 3. if the bid is not completed in non-erasable ink; or
 4. if the name of the bidder is not stated, or is indecipherable
- e) A bid will not be invalidated if the amount in words and the amount in figures do not correspond, in which case the amount in words shall be read out at the bid opening and shall be deemed to be the bid amount.
- f) The official bid document must be fully completed in indelible ink. Where information requested does not apply to the bidder and the space is left blank, it will be deemed to be not applicable.
- g) All requested relevant and/ or additional documentation such as Compliance Certificates, professional registration, artisan qualification, etc, must be submitted with the bid document.
- h) Bidders must submit a certified statement signed by the bidder declaring that the bidder has no undisputed commitments for municipal services towards a municipality or other service provider in respect of which payment is overdue for more than 90 days (Annexure A).
- i) The bidder must be in good standing to do business with the public sector in terms of Regulation 38 of the Supply Chain Management Regulations (Government Gazette 27636 of 30 May 2005).
- j) If the entity submitting a bid is a Joint Venture or Consortium or Partnership, each party to that formation must submit all the above information.
- k) The bidder must adhere to the Pricing Instructions. **Bidders are required to bid for all items in the pricing schedule. If not the bid will be considered to be non-responsive.**
- l) The Bidder's details must be provided.
- m) The necessary document authorising the Representative to sign and submit the bid on the bidder's behalf must be completed and signed.
- n) The Declaration of Interests by the bidder must be completed and signed.

- o) The bid must comply with all the minimum technical specifications.
- p) The MBD 9 (prohibition of restrictive practices) must be completed and signed.
- q) Checklist at the back of the bid document must be completed and adhered to.
- r) The bidder must initial every page of the bid document.
- s) The bidder must attach full specifications and warranty details

EVALUATION CRITERIA

- a) All bids received shall be evaluated in terms of the Supply Chain Management Regulation, the Preferential Procurement Policy Framework Act no 5 of 2000 and the revised Preferential Procurement Regulations of 2011
- b) The Council reserves the right to accept all, some, or none of the bids submitted — either wholly or in part — and it is not obligated to accept the lowest bid.
- c) The municipality may accept any offer notwithstanding the fact that the offer does not comply with the bid invitation in respect of which the offer has been made subject to the following:

The Accounting Officer is empowered to condone non-compliance with peremptory requirements of bids in cases where the condonation is not incompatible with public interest and promote the values of fairness, competitiveness and cost-effectiveness which are listed in Section 217 of the Constitution.

AREAS TO BE INCLUDED IN EVALUATION PROCESS:

Evaluation of Preference Points

The point's allocation for this bid will be as follows:

Price	80 points
B- BBEE Status Level of Contribution	<u>20 points</u>
Total	<u>100 points</u>

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2011

This preference form must form part of all bids invited. It contains general information and serves as a claim form for preference points for Broad-Based Black Economic Empowerment (B- BBEE) Status Level of Contribution

NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF B-BBEE, AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS, 2011.

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to all bids:

- the 80/20 system for requirements with a Rand value of up to R1 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R1 000 000 (all applicable taxes included).

1.2 The value of this bid is estimated not to exceed R1 000 000 (all applicable taxes included) and therefore the **80/20 points** system shall be applicable.

1.3 Preference points for this bid shall be awarded for:

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

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

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

1.4 Failure on the part of a bidder to fill in and/or to sign this form and submit a B-BBEE Verification Certificate from a Verification Agency accredited by the South African Accreditation System (SANAS) or a Registered Auditor approved by the Independent Regulatory Board of Auditors (IRBA) or an Accounting Officer as contemplated in the Close Corporation Act (CCA) together with the bid, will be interpreted to mean that preference points for B- BBEE status level of contribution are not claimed.

1.5. The purchaser reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the purchaser.

2. DEFINITIONS

2.1 “**all applicable taxes**” includes value-added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies;

2.2 “**B-BBEE**” means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;

2.3 “**B-BBEE status level of contributor**” means the B-BBEE status received by a measured entity based on its overall performance using the relevant scorecard contained in the Codes of Good Practice on Black Economic Empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;

- 2.4 **“bid”** means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of services, works or goods, through price quotations, advertised competitive bidding processes or proposals;
- 2.5 **“Broad-Based Black Economic Empowerment Act”** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- 2.6 **“comparative price”** means the price after the factors of a non-firm price and all unconditional discounts that can be utilized have been taken into consideration;
- 2.7 **“consortium or joint venture”** means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract;
- 2.8 **“contract”** means the agreement that results from the acceptance of a bid by an organ of state;
- 2.9 **“EME”** means any enterprise with an annual total revenue of R5 million or less .
- 2.10 **“Firm price”** means the price that is only subject to adjustments in accordance with the actual increase or decrease resulting from the change, imposition, or abolition of customs or excise duty and any other duty, levy, or tax, which, in terms of the law or regulation, is binding on the contractor and demonstrably has an influence on the price of any supplies, or the rendering costs of any service, for the execution of the contract;
- 2.11 **“functionality”** means the measurement according to predetermined norms, as set out in the bid documents, of a service or commodity that is designed to be practical and useful, working or operating, taking into account, among other factors, the quality, reliability, viability and durability of a service and the technical capacity and ability of a bidder;
- 2.12 **“non-firm prices”** means all prices other than “firm” prices;
- 2.13 **“person”** includes a juristic person;
- 2.14 **“rand value”** means the total estimated value of a contract in South African currency, calculated at the time of bid invitations, and includes all applicable taxes and excise duties;
- 2.15 **“sub-contract”** means the primary contractor’s assigning, leasing, making out work to, or employing, another person to support such primary contractor in the execution of part of a project in terms of the contract;
- 2.16 **“total revenue”** bears the same meaning assigned to this expression in the Codes of Good Practice on Black Economic Empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act and promulgated in the *Government Gazette* on 9 February 2007;
- 2.17 **“trust”** means the arrangement through which the property of one person is made over or bequeathed to a trustee to administer such property for the benefit of another person; and
- 2.18 **“trustee”** means any person, including the founder of a trust, to whom property is bequeathed in order for such property to be administered for the benefit of another person.

3. ADJUDICATION USING A POINT SYSTEM

- 3.1 The bidder obtaining the highest number of total points will be awarded the contract.
- 3.2 Preference points shall be calculated after prices have been brought to a comparative basis taking into account all factors of non-firm prices and all unconditional discounts;.
- 3.3 Points scored must be rounded off to the nearest 2 decimal places.
- 3.4 In the event that two or more bids have scored equal total points, the successful bid must be the one scoring the highest number of preference points for B-BBEE.

- 3.5 However, when functionality is part of the evaluation process and two or more bids have scored equal points including equal preference points for B-BBEE, the successful bid must be the one scoring the highest score for functionality.
- 3.6 Should two or more bids be equal in all respects, the award shall be decided by the drawing of lots.

4. POINTS AWARDED FOR PRICE

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

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

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

Where

P_s = Points scored for comparative price of bid under consideration

P_t = Comparative price of bid under consideration

P_{\min} = Comparative price of lowest acceptable bid

5. POINTS AWARDED FOR B- BBEE STATUS LEVEL OF CONTRIBUTION

- 5.1 In terms of Regulation 5 (2) and 6 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B- BBEE status level of contribution in accordance with the table below:

B- BBEE Status Level of Contributor	Number of points (90/10 system)	Number of points (80/20 system)
1	10	20
2	9	18
3	8	16
4	5	12
5	4	8
6	3	6
7	2	4
8	1	2
Non-compliant contributor	0	0

- 5.2 Bidders who qualify as EMEs in terms of the B- BBEE Act must submit a certificate issued by an Accounting Officer as contemplated in the CCA or a Verification Agency accredited by SANAS or a Registered Auditor. Registered auditors do not need to meet the prerequisite for IRBA's approval for the purpose of conducting verification and issuing EME's with B-BBEE Status Level Certificates.
- 5.3 Bidders other than EMEs must submit their original and valid B-BBEE status level verification certificate or a certified copy thereof, substantiating their B-BBEE rating issued by a Registered Auditor approved by IRBA or a Verification Agency accredited by SANAS.

- 5.4 A trust, consortium or joint venture, will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their B-BBEE status level certificate.
- 5.5 A trust, consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.
- 5.6 Tertiary institutions and public entities will be required to submit their B-BBEE status level certificates in terms of the specialized scorecard contained in the B-BBEE Codes of Good Practice.
- 5.7 A person will not be awarded points for B-BBEE status level if it is indicated in the bid documents that such a bidder intends sub-contracting more than 25% of the value of the contract to any other enterprise that does not qualify for at least the points that such a bidder qualifies for, unless the intended sub-contractor is an EME that has the capability and ability to execute the sub-contract.
- 5.8 A person awarded a contract may not sub-contract more than 25% of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level than the person concerned, unless the contract is sub-contracted to an EME that has the capability and ability to execute the sub-contract.

6. BID DECLARATION

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

7. B- BBEE STATUS LEVEL OF CONTRIBUTION CLAIMED IN TERMS OF PARAGRAPHS 1.3.1.2 AND 5.1

7.1 B- BBEE Status Level of Contribution: = (maximum of 20 points)

(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 5.1 and must be substantiated by means of a B-BBEE certificate issued by a Verification Agency accredited by SANAS or a Registered Auditor approved by IRBA or an Accounting Officer as contemplated in the CCA).

8 SUB-CONTRACTING

8.1 Will any portion of the contract be sub-contracted? **YES / NO (delete which is not applicable)**

8.1.1 If yes, indicate:

(i) What percentage of the contract will be subcontracted?%

(ii) The name of the sub-contractor?

(iii) The B-BBEE status level of the sub-contractor?

(iv) Whether the sub-contractor is an EME? **YES / NO (delete which is not applicable)**

9 DECLARATION WITH REGARD TO COMPANY/FIRM

9.1 Name of firm :

9.2 VAT registration number :

9.3 Company registration number :

9.4 Type of company/ firm

- Partnership/Joint Venture / Consortium
 - One person business/sole propriety
 - Close corporation
 - Company (LTD)
 - (Pty) Limited
- [TICK APPLICABLE BOX]

9.5 Describe principal business activities

.....

.....

.....

9.6 Company classification

- Manufacturer
 - Supplier
 - Professional service provider
 - Other service providers, e.g. transporter, etc.
- [TICK APPLICABLE BOX]

9.7 MUNICIPAL INFORMATION

Municipality where business is situated.....

Registered Account Number

Stand Number.....

9.8 TOTAL NUMBER OF YEARS THE COMPANY/FIRM HAS BEEN IN BUSINESS?

9.9 List all Shareholders by Name, Position, Identity Number, current employer and contact details of current employer, as relevant.

Name	ID Number	Current employer	Physical address of current employer	Contact details of current employer

9.10 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBE status level of contribution indicated in paragraph 7 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I / we acknowledge that:

- (i) The information furnished is true and correct;
- (ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form.
- (iii) In the event of a contract being awarded as a result of points claimed as shown in paragraph 7, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;
- (iv) If the B-BBEE status level of contribution has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –
 - (a) Disqualify the person from the bidding process;
 - (b) Recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 - (c) Cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) restrict the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, from obtaining business from any organ of state for a period not exceeding 10 years, after the audi alteram partem (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution

WITNESSES:

1.

2.

.....
SIGNATURE(S) OF BIDDER(S)
.....

DATE :

ADDRESS :

.....
.....

DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

- 1 This Municipal Bidding Document must form part of all bids invited.
- 2 It serves as a declaration to be used by municipalities and municipal entities in ensuring that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system.
- 3 The bid of any bidder may be rejected if that bidder, or any of its directors have:
 - a. abused the municipality's / municipal entity's supply chain management system or committed any improper conduct in relation to such system;
 - b. been convicted for fraud or corruption during the past five years;
 - c. willfully neglected, reneged on or failed to comply with any government, municipal or other public sector contract during the past five years; or
 - d. been listed in the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004).
- 4 **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**

Item	Question	Yes	No
4.1	<p>Is the bidder or any of its directors listed on the National Treasury's Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector?</p> <p>(Companies or persons who are listed on this Database were informed in writing of this restriction by the Accounting Officer/Authority of the institution that imposed the restriction after the <i>audi alteram partem</i> rule was applied).</p> <p>The Database of Restricted Suppliers now resides on the National Treasury's website (www.treasury.gov.za) and can be accessed by clicking on its link at the bottom of the home page.</p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.1.1	If so, furnish particulars:		
4.2	<p>Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)?</p> <p>The Register for Tender Defaulters can be accessed on the National Treasury's website (www.treasury.gov.za) by clicking on its link at the bottom of the home page.</p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.2.1	If so, furnish particulars:		

4.3	Was the bidder or any of its directors convicted by a court of law (including a court of law outside the Republic of South Africa) for fraud or corruption during the past five years?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.3.1	If so, furnish particulars:		
Item	Question	Yes	No
4.4	Does the bidder or any of its directors owe any municipal rates and taxes or municipal charges to the municipality / municipal entity, or to any other municipality / municipal entity, that is in arrears for more than three MONTHSs?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.4.1	If so, furnish particulars:		
4.5	Was any contract between the bidder and the municipality / municipal entity or any other organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.5.1	If so, furnish particulars:		

CERTIFICATION

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

I ACCEPT THAT, IN ADDITION TO CANCELLATION OF A CONTRACT, ACTION MAY BE TAKEN AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....

Signature

.....

Date

.....

Position

.....

Name of Bidder

CERTIFICATE OF INDEPENDENT BID DETERMINATION

- 1 This Municipal Bidding Document (MBD) must form part of all bids¹ invited.

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

- 3 Municipal Supply Regulation 38 (1) prescribes that a supply chain management policy must provide measures for the combating of abuse of the supply chain management system, and must enable the accounting officer, among others, to:
 - a. take all reasonable steps to prevent such abuse;
 - b. reject the bid of any bidder if that bidder or any of its directors has abused the supply chain management system of the municipality or municipal entity or has committed any improper conduct in relation to such system; and
 - c. cancel a contract awarded to a person if the person committed any corrupt or fraudulent act during the bidding process or the execution of the contract.

- 4 This MBD serves as a certificate of declaration that would be used by institutions to ensure that, when bids are considered, reasonable steps are taken to prevent any form of bid-rigging.

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

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

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

CERTIFICATE OF INDEPENDENT BID DETERMINATION

I, the undersigned, in submitting the accompanying bid: **08/2/14/23: FACILITATION OF MUNICIPAL ANNUAL MEDICAL ASSESSMENTS** invitation for the bid made by: **WITZENBERG MUNICIPALITY** does hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of: _____ that:

(Name of Bidder)

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign, the bid, on behalf of the bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:
 - (a) has been requested to submit a bid in response to this bid invitation;
 - (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
 - (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder
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 consortium³ 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.

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

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.

.....

Signature

.....

Date

.....

Position

.....

Name of Bidder



BID NO 08/2/14/23: FACILITATION OF MUNICIPAL ANNUAL MEDICAL ASSESSMENTS

Authorisation to deduct outstanding amounts

To: Municipal Manager, Witzenberg Municipality

From: _____
(Name of Bidder or Consortium)

AUTHORISATION FOR THE DEDUCTION OF OUTSTANDING AMOUNTS OWED TO COUNCIL

I, THE UNDERSIGNED,

(FULL NAME IN BLOCK LETTERS)

Hereby authorise the Witzenberg Municipality to deduct the full amount outstanding by the business organization / Director, shareholder, partner, etc from any payment due to us / me.

.....
Signature

THUS DONE AND SIGNED for and on behalf on the Bidder / Contractor

at on the day of 20.....
(Place) (Date) (Month) (Year)
in the presence of the subscribing witnesses.

AS WITNESSES:

1..... Name in Block Letters:
(SIGNATURE)

2..... Name in Block Letters:
(SIGNATURE)

To: Municipal Manager, Witzenberg Municipality

CERTIFICATE FOR MUNICIPAL SERVICES AND PAYMENTS TO SERVICE PROVIDER

BID NO 08/2/14/23: FACILITATION OF MUNICIPAL ANNUAL MEDICAL ASSESSMENTS

NAME OF THE BIDDER:

FURTHER DETAILS OF THE BIDDER(S); Proprietor/ Director(s)/ Partner(s), etc:

Physical business address of Bidder	Municipal Account numbers

If there is not enough space for all the names, please attach the additional details to the Bid Document

Name of Director/Member/Partner	Identity number	Physical residential address of Director/Member/Partner	Municipal Account numbers

I, _____, the undersigned,
(full name in block letters)

certify that the information furnished on this declaration form is correct and that I/ we have no undisputed commitments for municipal services towards a municipality or other service provider in respect of which payment is overdue for more than 90 days. Bidder must attach copy of their municipal account.

Signature

THUS DONE AND SIGNED for and on behalf on the Bidder/ Contractor

at on the Day of 20.....
(PLACE) (DATE) (MONTH) (YEAR)

Please Note:
Even if the requested information is not applicable to the Bidder, the table above should be endorsed and THIS DECLARATION MUST STILL BE SIGNED.

CHECK LIST FOR COMPLETENESS OF BID DOCUMENT

The bidder must ensure that the following checklist is completed, that the necessary documentation is attached to this bid document and that all declarations are signed:

**Mark with "X" where applicable*

Items to be checked	Yes	No	Comments
1. Completed page containing the details of bidder			
2. Valid and original tax clearance certificate attached to bid document (MBD 2). An original Valid Tax Clearance Certificate must be attached to the bid document. Bidders who are registered on the municipality's accredited supplier database and submitted an original and valid tax clearance certificate with their application form do not need to submit it again with this bid, provided that the original tax clearance certificate will be valid at the time of bid closing. However, the onus is on the bidder to confirm this with the Supply Chain Unit.			
3. An original or certified copy of B- BBEE status level verification certificate.			
4. Adhered to the pricing instructions (MBD 3.1)			
5. Completed and signed declaration of interest (MBD 4)			
6. Preference points claimed and signed declarations (MBD 6.1)			
7. Signed declaration of bidder's past supply chain management practices (MBD 8)			
8. Prohibition of Restrictive Practices (MBD9) be completed and signed.			
9. Comply with full specifications.			
10. Bidder must initial every page of this bid document.			
11. Bidder must attach full specifications if it deviates from the said specification			
12. Latest municipal account of the bidder and its directors must be attached a. If the bidder is not responsible for the payment of municipal rates and/ services, details in support of this must be attached to this bid document e.g. letter from landlord			
13. Proof to be submitted in terms of the Pre-Qualification Criteria on page 3:			
a. Valid proof of registration with the HPCSA (Health Practitioners Council of South Africa) attached			
b. Proof of qualification for Occupational Health Nurse or Doctor			
c. Experience as an occupational medical service provider			

CERTIFICATION

I, THE UNDERSIGNED (FULL NAME)
CERTIFY THAT THE INFORMATION FURNISHED ON THIS CHECK LIST IS TRUE AND CORRECT.

.....
Signature

.....
Date

.....
Position

.....
Name