



# CAPE WINELANDS DISTRICT

MUNICIPALITY • MUNISIPALITEIT • UMASIPALA

**TENDER NUMBER: T 2022/072**

**CONDUCT AN ASSESSMENT OF ALL RURAL, SOCIAL AND ECONOMIC DEVELOPMENT ACTIVITIES WITHIN THE CAPE WINELANDS DISTRICT MUNICIPALITY AS WELL AS THE FIVE CATEGORY-B MUNICIPALITIES WITHIN THE DISTRICT AND DEVELOP A LONG-TERM FINANCIAL MODEL TO SUPPORT DECISION MAKING DURING THE IDP/BUDGET PROCESS**

COMPANY NAME:

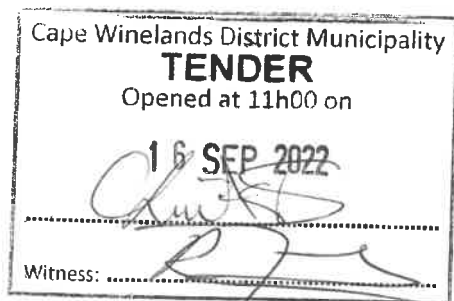
Palmer Development Group (PDG)

POSTAL ADDRESS:

Ubunye House

70 Rosmead Avenue

Kenilworth, 7708



**ANY ENQUIRIES REGARDING THE BIDDING PROCEDURE MAY BE DIRECTED TO:**

Financial and Strategic Support Services

Supply Chain Management

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**CONDUCT AN ASSESSMENT OF ALL RURAL, SOCIAL AND ECONOMIC DEVELOPMENT  
ACTIVITIES WITHIN THE CAPE WINELANDS DISTRICT MUNICIPALITY AS WELL AS THE  
FIVE CATEGORY-B MUNICIPALITIES WITHIN THE DISTRICT AND DEVELOP A LONG-TERM  
FINANCIAL MODEL TO SUPPORT DECISION MAKING DURING THE IDP/BUDGET PROCESS**

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## A. TENDER NOTICE

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Tenders are hereby invited from bidders to Conduct an assessment of all Rural, Social and Economic Development activities within the Cape Winelands District Municipality as well as the five category-B municipalities within the district and develop a long-term financial model to support decision making during the IDP/Budget process.

Technical enquiries regarding this bid can be directed to Jade Swanepoel per e-mail: [jade@capewinelands.gov.za](mailto:jade@capewinelands.gov.za).

**Closing date: 11:00 on Friday, 16 September 2022**

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Tender documents, in English, are available free of charge on the websites: [www.capewinelands.gov.za](http://www.capewinelands.gov.za) or <https://etenders.treasury.gov.za>. Alternatively, hard copies of the document are obtainable from the offices of the Supply Chain Management Unit, Cape Winelands District Municipality at 29 Du Toit Street, Stellenbosch, upon payment of a non-refundable fee of R240.00 per document.

All prospective bidders must ensure that they are registered and accredited on the Cape Winelands District Municipality's Supplier Database and the Central Supplier Database, prior to the closing date of the tender.

Duly completed tenders must be enclosed in a (separate) sealed envelope and endorsed with the relevant tender number and description on the envelope/s. The sealed tenders must be placed in the official tender box of the District Municipality's offices at 29 Du Toit Street, Stellenbosch on the abovementioned time and dates.

Tenders will be opened in public as soon as possible after this closing time.

**HF PRINS  
MUNICIPAL MANAGER**

## **B. GENERAL CONDITIONS AND INFORMATION**

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Inviting of tenders by the Cape Winelands District Municipality (CWDM), all relevant bid documentation, submitting of tenders by prospective bidders, evaluation/awarding of tenders and all subsequent contractual responsibilities regarding supply and delivery of goods and/or services, will be managed in terms of and MUST comply with –

- Chapter 11 of the Municipal Finance Management Act, 2003 (Act No. 56 of 2003);
- Municipal Supply Chain Management Policy of the CWDM;
- Supply Chain Management: A guide for Accounting Officers (AO) of Municipalities (Guide for Accounting Officers);
- Any relevant Regulations/Circulars issued by the National Treasury, from time to time; and
- Any Special Conditions detailed in this Contract (SCC) – referring to, but not limited to paragraphs **B.1. - 17.** and **C to P.**

Where the General Conditions of Contract (GCC) and SCC are in conflict with one another, the stipulations of the SCC will prevail (Chapter 4.5.2.9 – Guide for Accounting Officers).

### **1. Acceptance or Rejection of a Tender**

The Municipality reserves the right to withdraw any invitation to tender and/or to re-advertise or to reject any tender or to accept any tender in whole or part.

The Municipality does not bind itself to accepting the lowest tender or the tender scoring the highest points.

The Municipality reserves the right to accept more than one tender (in the event of a number of items being offered).

### **2. Validity Period**

The fact and action of handing in a tender to the Municipality is accepted as a contract between the Municipality and the bidder whereby such a tender remains valid and available for a period of 180 days, calculated from the closing date as advertised for the tender, for acceptance, or non-acceptance by the Municipality. The bidder undertakes not to withdraw, or alter, the tender during this period.

### **3. Registration on Accredited Supplier Database**

It is expected of all prospective service providers who are not yet registered on the Municipality's Accredited Supplier Database to register without delay on the prescribed form.

It will be expected from Suppliers to update registration details every twelve (12) months from date of registration. Payment will not be effected if supplier information is outdated.

The Municipality reserves the right not to award tenders to prospective suppliers who are not registered on the Database.

#### **4. Completion of Tender Documents**

The official tender form must be completed in BLACK ink and any corrections to the official tender form must also be made in BLACK ink and signed by the bidder.

Any tender documents received with correction fluid (Tippex) corrections shall be disqualified.

The complete original tender document must be returned. Missing pages will result in the disqualification of the tender.

Any ambiguity has to be cleared with contact person for the tender before the tender closure.

#### **5. Authorised Signatory**

A copy of the recorded Resolution taken by the Board of Directors, members, partners or trustees authorising the representative to submit this bid on the bidder's behalf must be attached to the Bid Document on submission of same.

A bid shall be eligible for consideration only if it bears the signature of the bidder or of some person duly and lawfully authorised to sign it for and on behalf of the bidder.

If such a copy of the Resolution does not accompany the bid document of the successful bidder, the Municipality reserves the right to obtain such document after the closing date to verify that the signatory is in order. If no such document can be obtained within a period as specified by the Municipality, the bid will be disqualified.

#### **6. Site/Information Meetings**

Site or information meetings, if specified, are compulsory. Bids will not be accepted from bidders who have not attended compulsory site or information meetings. Bidders that arrive fifteen (15) minutes or more after the advertised time the meeting starts, will not be allowed to attend the meeting or to sign the attendance register. If a bidder is delayed, he must inform the contact person before the meeting commences and will only be allowed to attend the meeting if the chairperson of the meeting, as well as all the other bidders attending the meeting, give permission to do so.

All partners or the leading partner of a Joint Venture must attend the compulsory site or information meeting.

#### **7. Quantities of Specific Items**

If tenders are called for a specific number of items, the Municipality reserves the right to change the number of such items to be higher or lower. The successful bidder will then be given an opportunity to evaluate the new scenario and inform the Municipality if it is acceptable. If the successful bidder does not accept the new scenario, it will be offered to the second-placed bidder.

#### **8. Expenses Incurred in Preparation of Tender**

The Municipality shall not be liable for any expenses incurred in the preparation and submission of the tender.

**9. Contact with Municipality after Tender Closure Date**

Bidders shall not contact the Municipality on any matter relating to their bid from the time of the opening of the bid to the time the contract is awarded. If a bidder wishes to bring additional information to the notice of the Municipality, it should do so in writing to the Municipality. Any effort by the firm to influence the Municipality in the bid evaluation, bid comparison or contract award decisions may result in the rejection of the bid.

**10. Opening, Recording and Publications of Tenders Received**

Tenders will be opened on the closing date immediately after the closing time specified in the tender documents. The names of the bidders, and if practical, the total amount of each bid and of any alternative bids will be read out aloud.

Telexed, faxed or e-mailed tenders will not be accepted.

The tender forms should be carefully completed and no errors will be condoned after tenders have been opened.

The Bidder will be liable to take out **forward cover** to barricade him/her against fluctuation of the exchange rate in the event of importing any component, related to the quotation, from a country dealing in currency other than that of South Africa.

**11. Evaluation of Tenders**

Tenders will be evaluated in terms of their responsiveness to the tender specifications and requirements, as well as such additional criteria as set out in this set of tender documents.

**12. Subcontracting**

The Contractor shall not subcontract the whole of the contract.

Except where otherwise provided by the Contract, the Contractor shall not subcontract any part of the Contract without the prior written consent of the Municipality, which consent shall not be unreasonably withheld.

Any consent granted or appointment of a subcontractor shall not imply a contract between the Municipality and the subcontractor, or a responsibility or liability on the part of the Municipality to the subcontractor and shall not relieve the Contractor from any liability or obligation under the Contract and he shall be liable for the acts, defaults and neglects of any subcontractor, his agents or employees as fully as if they were the acts, defaults or neglects of the Contractor, his agents or employees.

**13. Extension of Contract**

The contract with the successful bidder may be extended should additional funds become available.

**14. Past Practices**

The bid of any bidder may be rejected if that bidder or any of its directors have abused the Municipality's Supply Chain Management system or committed any improper conduct in relation to such system.

The bid of any bidder may be rejected if it is or has been found that that bidder or any of its directors influenced or tried to influence any official or councillor with this or any past tender.

The bid of any bidder may be rejected if it is or has been found that that bidder or any of its directors offered, promised or granted any official or any of his/her close family members, partners or associates any reward, gift, favours, hospitality or any other benefit in any improper way, with this or any past tender.

**15. Persons in the Service of the State**

Any person, having a kinship with persons in the service of the state, including a blood relationship, may make an offer 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 and/or take an oath declaring his/her interest.

**16. Broad-Based Black Economic Empowerment (B-BBEE) Status Level Verification Certificates**

Bidders are required to submit original and valid B-BBEE Status Level Verification Certificates or certified copies of the original, not a photocopy of another certified copy thereof together with their bids, to substantiate their B-BBEE rating claims.

Bidders who do not submit B-BBEE Status Level Verification Certificates or who are non-compliant contributors to B-BBEE do not qualify for preference points for B-BBEE but should not be disqualified from the bidding process. They will score points out of 90 or 80 for price only and zero (0) points out of 10 or 20 for B-BBEE.

A trust, consortium or joint venture must submit a consolidated B-BBEE Status Level Verification Certificate for every separate bid.

Public entities and tertiary institutions must also submit B-BBEE Status Level Verification Certificates together with their bids.

If an institution is already in possession of a valid and original or certified copy of a bidder's B-BBEE Status Level Verification Certificate that was obtained for the purpose of establishing the database of possible suppliers for price quotations or that was submitted together with another bid, it is not necessary to obtain a new B-BBEE Status Level Verification Certificate each time a bid is submitted from the specific bidder.

Such a certificate may be used to substantiate B-BBEE rating claims provided that the closing date of the bid falls within the expiry date of the certificate that is in the institution's possession.

Each time this provision is applied, cross-reference must be made to the B-BBEE Status Level Verification Certificate already in possession for audit purposes.

Accounting Officers/Accounting Authorities must ensure that the B-BBEE Status Level Verification Certificates submitted are issued by the following agencies:

Bidders other than EME's:

- Verification agencies accredited by SANAS; or
- Registered auditors approved by the Independent Regulatory Board of Auditors (IRBA) (until the expiration of the period prescribed by the Department of Trade, Industry and Competition).

Bidders who qualify as EME's:

- Sworn affidavit signed by the Exempted Micro Enterprises (EME) representative and attested by a Commissioner of Oaths.

#### **VALIDITY OF B-BBEE STATUS LEVEL VERIFICATION CERTIFICATES**

**(a) Verification agencies accredited by South African National Accreditation System (SANAS):**

- (i) These certificates are identifiable by a SANAS logo and a unique BEE Verification Agency (BVA) number.
- (ii) Confirmation of the validity of a B-BBEE Status Level Verification Certificate can be done by tracing the name of the issuing Verification Agency to the list of all SANAS accredited agencies. The list is accessible on [http://www.sanas.co.za/directory/bbee\\_default.php](http://www.sanas.co.za/directory/bbee_default.php).
- (iii) The relevant BVA may be contacted to confirm whether such a certificate was issued.

**(b) As a minimum requirement, all valid B-BBEE Status Level Verification Certificates should have the following information detailed on the face of the certificate:**

- (i) The name and physical location of the measured entity;
- (ii) The registration number and, where applicable, the VAT number of the measured entity;
- (iii) The date of issue and date of expiry;
- (iv) The certificate number for identification and reference;
- (v) The scorecard that was used (for example Qualifying Small Enterprise (QSE), Specialized or Generic);
- (vi) The name and / or logo of the Verification Agency;
- (vii) The SANAS logo;
- (viii) The certificate must be signed by the authorized person from the Verification Agency; and
- (ix) The B-BBEE Status Level of Contribution obtained by the measured entity.

**(c) Registered auditors approved by IRBA**

The format and content of B-BBEE Status Level Verification Certificates issued by registered auditors approved by IRBA must –

- (i) Clearly identify the B-BBEE approved registered auditor by the auditor's individual registration number with IRBA and the auditor's logo;
- (ii) Clearly record an approved B-BBEE Verification Certificate identification reference in the format required by the South African Standard on Assurance Engagements (SASAE);



- (iii) Reflect relevant information regarding the identity and location of the measured entity;
  - (iv) Identify the Codes of Good Practice or relevant Sector Codes applied in the determination of the scores;
  - (v) Record the weighting points (scores) attained by the measured entity for each scorecard element, where applicable, and the measured entity's overall B-BBEE Status Level of Contribution; and
  - (vi) Reflect that the B-BBEE Verification Certificate and accompanying assurance report issued to the measured entity is valid for twelve (12) months from the date of issuance and reflect both the issuance and expiry date.
- (d) Confirmation of the validity of a B-BBEE Status Level Verification Certificate can be done by tracing the name of the issuing B-BBEE approved registered auditor to the list of all approved registered auditors. The list is accessible on <http://www.thedti.gov.za> and / <http://www.irba.co.za>.
- (e) The relevant approved registered auditor may be contacted to confirm whether such a certificate was issued.
- (f) Accounting officers as contemplated in section 60(4) of the Closed Corporations Act, 1984 (Act No. 69 of 1984) (CCA)**
- (i) These certificates will be issued on the accounting officer's letterhead with the accounting officer's practice number and contact number clearly specified on the face of the certificates.
  - (ii) The content of B-BBEE Status Level Verification Certificates issued by accounting officers as contemplated in the CCA is detailed in paragraph 4.8.5 below.

#### **VERIFICATION OF B-BBEE LEVELS IN RESPECT OF EME's**

- (a) In terms of the Generic Codes of Good Practice, an enterprise including a sole propriety with annual total revenue of R10 million or less qualifies as an Exempted Micro Enterprises (EME).
- (b) In instances where Sector Charters are developed to address the transformation challenges of specific sectors or industries, the threshold for qualification as an EME may be different from the generic threshold of R10 million.
- (c) The relevant Sector Charter thresholds will therefore be used as a basis for a potential bidder to qualify as an EME.
  - (i) For example the approved thresholds for EMEs for the Tourism and Construction Sector Charters are R2.5 million and R1.5 million respectively;
  - (ii) An EME automatically qualifies as a Level 4 contributor with B-BBEE recognition level of 100% in terms of the Codes of Good Practice;
  - (iii) An EME with at least 51% black ownership qualifies as Level 2 Contributor with B-BBEE level of 125% in terms of the Codes of Good Practice;
  - (iv) An EME with 100% black ownership qualifies as a Level 1 contributor with B-BBEE level of 135% in terms of the Codes of Good Practice;

- (v) An EME that is regarded as a specialized enterprise with at least 75% black beneficiaries qualifies as Level 1 contributor with B-BBEE level of 135% in terms of Codes of Good Practice;
- (vi) An EME that is regarded as a specialized enterprise with at least 51% black beneficiaries qualifies as a Level 2 contributor with B-BBEE level of 125% in terms of the Codes of Good Practice;
- (vii) An EME is required to submit a sworn affidavit confirming their annual total revenue of R10 million or less and level of black ownership to claim points as prescribed by regulations 6 and 7 of the Preferential Procurement Regulations 2017;
- (viii) An EME that is regarded as a Specialized Enterprise, is required to submit a sworn affidavit confirming their annual turnover/allocated budget/gross receipt of R10 million or less and level of percentage of black beneficiaries to claim points as prescribed by regulations 6 and 7 of the Preferential Procurement Regulations 2017; and
- (ix) An EME may be measured in terms of the QSE scorecard should they wish to maximize their points and move to a higher B-BBEE recognition level. It is in this context that an EME may submit a B-BBEE verification certificate.

#### **ELIGIBILITY AS QUALIFYING SMALL ENTERPRISES (QSE)**

The Codes define a QSE as any enterprise with annual total revenue of between R10 million and R50 million.

- (i) A QSE with at least 51% black ownership qualifies as a Level 2 contributor;
- (ii) A QSE with 100% black ownership qualifies as a Level 1 Contributor;
- (iii) A QSE that is regarded as a specialized enterprise with at least 75% black beneficiaries qualifies as a Level 1 contributor with B-BBEE level of 135% in terms of the Codes of Good Practice;
- (iv) A QSE that is regarded as a specialized enterprise with at least 51% black beneficiaries qualifies as a Level 2 contributor with B-BBEE level of 125% in terms of the Codes of Good Practice;
- (v) A QSE is required to submit a sworn affidavit confirming their annual total revenue of between R10 million and R50 million and level of black ownership or a B-BBEE level verification certificate to claim points as prescribed by regulations 6 and 7 of the Preferential Procurement Regulations, 2017; and
- (vi) A QSE that is regarded as a specialized enterprise is required to submit a sworn affidavit confirming their annual turnover/budget/gross receipt of R50 million or less and level of percentage of black beneficiaries or a B-BBEE level verification certificate to claim points as prescribed by regulations 6 and 7 of the Preferential Procurement Regulations 2017.

**IN ORDER TO BE AWARDED PREFERENCE POINTS, ANNEXURE H, QUESTIONNAIRE AND ANNEXURE K, PREFERENCE POINTS CLAIM FORM (MBD 6.1), MUST BE COMPLETED. FAILURE TO COMPLY WITH THE ABOVEMENTIONED WILL RESULT IN NO PREFERENCE POINTS BEING AWARDED.**

**17. Application**

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.

Where applicable, special conditions of contract may be laid down and included to cover specific supplies, services or works.

Where such special conditions of contract are in conflict with these general conditions, the special conditions shall apply.

**18. Standards**

The goods supplied or the services rendered shall conform to the standards mentioned in the bidding documents and specifications.

**19. Information and Inspection**

The service provider shall not, without the District Municipality's prior written consent, disclose the agreement, or any provision thereof, or any specification, plan, drawing, pattern, sample, or information furnished by or on behalf of the District Municipality in connection therewith, to any person other than a person employed by the service provider in the performance of the agreement. 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.

The service provider shall permit the District Municipality to inspect the supplier's records relating to the performance of the service provider and to have them audited by auditors appointed by the District Municipality, if so required by the District Municipality.

**20. Governing Language**

The governing language shall be English. All correspondence and other documents pertaining to the agreement that is exchanged by the parties shall also be written in English.

**21. Payments**

Payments shall be made by the District Municipality within **thirty 30)** calendar days of receiving the relevant **invoice/statement provided** by the supplier.

Payment will be made in Rand unless otherwise stipulated.

**22. Prices and Evaluation of Bids**

Prices charged by the service provider for goods delivered and services performed under the contract shall not vary from the prices quoted by the service provider in this Tender.

The Bidder will be liable to take out forward cover to barricade him/her against fluctuation of the exchange rate in the event of importing any component, related to the tender, from a country dealing in currency other than that of South Africa.

THIS BID WILL BE EVALUATED AND ADJUDICATED ACCORDING TO THE FOLLOWING:

- Relevant specifications;
- Value for money;
- Capability to execute the contract; and
- PPPFA & associated Regulations.

**23. Termination for default**

The District Municipality, without prejudice to any other remedy for breach of contract, by written notice of default sent to the service provider, may terminate this agreement in whole or in part:

- (a) If the service provider fails to deliver any or all of the goods within the period(s) specified in the agreement;
- (b) If the service provider fails to perform any obligation(s) under the contract; or
- (c) If the service provider in the judgment of the District Municipality, has engaged in corrupt or fraudulent practices in competing for or in executing the contract.

In the event the District Municipality terminates the contract in whole or in part, the District Municipality may procure, upon such terms and in such manner as it deems appropriate, goods, works or services similar to those undelivered, and the service provider shall be liable to the District Municipality for any excess costs for such similar goods, works or services. However, the service provider shall continue performance of the contract to the extent not terminated.

Where the District Municipality terminates the contract in whole or in part, the District Municipality may decide to impose a restriction penalty on the service provider by prohibiting such service provider from doing business with the public sector for a period not exceeding ten (10) years.

If a District Municipality intends imposing a restriction on a service provider or any person associated with the service provider, the service provider 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 service provider fail to respond within the stipulated fourteen (14) days the District Municipality may regard the service provider as having no objection and proceed with the restriction.

Any restriction imposed on any person by the District Municipality will, at the discretion of the District Municipality, 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 District Municipality actively associated.

If a restriction is imposed, the District Municipality must, within five (5) working days of such imposition, furnish the National Treasury, with the following information:

- (a) The name and address of the supplier and/or person restricted by the District Municipality;
- (b) The date of commencement of the restriction;

- (c) The period of restriction; and
- (d) The reasons for the restriction

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

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, 2004 (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 (5) years and not more than ten (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. Termination for Insolvency**

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

#### **25. Settlement of Disputes**

If any dispute or difference of any kind whatsoever arises between the District Municipality and the service provider 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.

If, after thirty (30) days, the parties have failed to resolve their dispute or difference by such mutual consultation, then either the District Municipality or the service provider 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.

Should it not be possible to settle a dispute by means of mediation, it may be settled in a South African court of law.

Notwithstanding any reference to mediation and/or court proceedings herein, the parties shall continue to perform their respective obligations under the contract unless they otherwise agree; and

The District Municipality shall pay the service provider any monies due for goods delivered and/or services rendered according to the prescripts of the contract.

#### **26. Applicable Law**

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

**27. Notices**

Every written acceptance of a bid and any other notices shall be posted to the service provider concerned 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.

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.

**28. Taxes and Duties**

A service provider shall be entirely responsible for all taxes, duties, license fees, etc., of the contracted goods to the District Municipality.

No contract shall be concluded with any tenderer whose tax matters are not in order.

No contract shall be concluded with any tenderer whose municipal rates and taxes and municipal services charges are in arrears.

**29. Value-added Tax (VAT) on Invoices**

Tax invoices are to comply with the requirements as contained in the Value Added Tax Act, 1991 (Act No. 89 of 1991). The content of the invoice must contain information as prescribed by the Act.

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, 1991 (Act No. 89 of 1991) 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.

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. The Cape Winelands District Municipality will deem the price above R1,000,000.00 (R1 million) to be VAT inclusive even if it is indicated that no VAT is charged. Please ensure that provision is made for VAT in these instances.

The VAT registration number of the Cape Winelands District Municipality is 4700193495.

**30. Tax Clearance Certificate**

A copy of a Tax Compliance Status Pin, printed from the South African Revenue Service (SARS) website, must accompany the bid documents. The onus is on the bidder to ensure that their tax matters are in order with SARS.

In the case of a Consortium/Joint Venture, every member must submit a separate Tax Compliance Status Pin, printed from the SARS website, with the bid documents.

If a bid is not supported by a Tax Compliance Status Pin as an attachment to the bid documents, the Municipality reserves the right to obtain such documents after the closing date to verify that the bidder's tax matters are in order. If no such document can be obtained within a period as specified by the Municipality, the bid will be disqualified. The Tax Compliance Status Pin will be verified by the Municipality on the SARS website.

**31. Municipal Rates, Taxes and Charges**

A certified copy of the bidder's and those of its directors municipal accounts (for the municipality where the bidder pays his/her account) for the month preceding the tender closure date must accompany the tender documents. If such a certified copy does not accompany the bid document of the successful bidder, the Municipality reserves the right to obtain such documents after the closing date to verify that their municipal accounts are in order.

Any bidder which is or whose directors are in arrears with their municipal rates and taxes or municipal charges due to any municipality or any of its entities for more than three (3) months and have not made an arrangement for settlement of same before the bid closure date will be unsuccessful.

If a bidder rents their premises, proof must be submitted that the rental includes their municipal rates and taxes or municipal charges and that their rent is not in arrears.

**32. Construction Industry Development Board (CIDB) (If applicable)**

When applicable, the bidder's CIDB registration number must be included with the tender. The Municipality will verify the bidder's CIDB registration during the evaluation process.

**33. Letter of Good Standing from the Commissioner of Compensation**

A valid Letter of Good Standing from the Compensation Commissioner or a certified copy thereof must accompany the bid documents unless the bidder is registered on the Accredited Supplier Database of the Municipality and the Municipality has a valid Letter of Good Standing from the Compensation Commissioner or a certified copy thereof for the bidder on record. The onus is on the bidder to ensure that the Municipality has a valid Letter of Good Standing from the Compensation Commissioner or a certified copy thereof on record.

A Letter of Good Standing for "quotations purposes" from the Department of Employment and Labour will also be accepted.

If no such document/s as specified by the Municipality is submitted, the bid will be disqualified.

**34. Protection of Personal Information**

In submitting any information or documentation requested in this tender document, or any other information that may be requested pursuant to this tender, bidders are consenting to the processing by the Cape Winelands District Municipality or its stakeholders of their personal information and all other personal information contained therein, as contemplated in the Protection of Personal Information Act, 2013 (Act No. 4 of 2013) and Regulations promulgated thereunder ("POPI Act").

Further, bidders declare that they have obtained all consents required by the POPI Act or any other law applicable. Thus, bidders hereby indemnify the Cape Winelands District Municipality against any civil or criminal action, administrative fine or other penalty or loss that may arise as a result of the processing of any personal information that they submit.

## C. NATIONAL TREASURY - GOVERNMENT PROCUREMENT: GENERAL CONDITIONS OF CONTRACT

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The purpose of this document is to:

- (a) Draw special attention to certain general conditions applicable to government bids, contracts and orders; and
- (b) To ensure that clients be familiar with regard to the rights and obligations of all parties involved in doing business with government.
- (c) The General Conditions of Contract will form part of all bid documents and may not be amended.
- (d) Special Conditions of Contract (SCC) relevant to a specific bid, should be compiled separately for every bid and will supplement the General Conditions of Contract. Whenever there is a conflict, the provisions in the SCC will prevail.

### 1. DEFINITIONS

The following terms shall be interpreted as indicated:

- 1.1 **“Closing time”** means the date and hour specified in the bidding documents for the receipt of bids.
- 1.2 **“Contract”** 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.
- 1.3 **“Contract price”** means the price payable to the supplier under the contract for the full and proper performance of his contractual obligations.
- 1.4 **“Corrupt practice”** 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.
- 1.5 **“Countervailing duties”** are imposed in cases where an enterprise abroad is subsidized by its government and encouraged to market its products internationally.
- 1.6 **“Country of origin”** 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.
- 1.7 **“Day”** means calendar day.
- 1.8 **“Delivery”** means delivery in compliance of the conditions of the contract or order.
- 1.9 **“Delivery ex stock”** means immediate delivery directly from stock actually on hand.
- 1.10 **“Delivery into consignees store or to his site”** 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 goods are so delivered and a valid receipt is obtained.



- 1.11 **“Dumping”** 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.
- 1.12 **“Force majeure”** 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.
- 1.13 **“Fraudulent practice”** 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.
- 1.14 **“GCC”** means the General Conditions of Contract.
- 1.15 **“Goods”** means all of the equipment, machinery, and/or other materials that the supplier is required to supply to the purchaser under the contract.
- 1.16 **“Imported content”** means that portion of the bidding price represented by the cost of components, parts or materials which have been or are still to be imported (whether by the supplier or his subcontractors) and which costs are inclusive of the costs abroad, plus freight and other 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 goods covered by the bid will be manufactured.
- 1.17 **“Local content”** means that portion of the bidding price, which is not included in the imported content provided that local manufacture does take place.
- 1.18 **“Manufacture”** means the production of products in a factory using labour, materials, components and machinery and includes other related value-adding activities.
- 1.19 **“Order”** means an official written order issued for the supply of goods or works or the rendering of a service.
- 1.20 **“Project site”**, where applicable, means the place indicated in bidding documents.
- 1.21 **“Purchaser”** means the organization purchasing the goods.
- 1.22 **“Republic”** means the Republic of South Africa.
- 1.23 **“SCC”** means the Special Conditions of Contract.
- 1.24 **“Services”** means those 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.
- 1.25 **“Supplier”** means the successful bidder who is awarded the contract to maintain and administer the required and specified service(s) to the State.
- 1.26 **“Tort”** means in breach of contract.

1.27 **“Turnkey”** 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.

1.28 **“Written” or “in writing”** means hand-written 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 (excluding professional services related to the building and construction industry), 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 goods, 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 so 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:
- (a) a 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
  - (b) 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 goods to be produced or services to be rendered should at any stage be subject to inspections, tests and analyses, the bidder or contractor's premises shall be open, at all reasonable hours, for inspection by a representative of the purchaser or 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 Goods 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 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, if any, and in any subsequent instructions ordered by the purchaser.

## **10. DELIVERY AND DOCUMENTS**

- 10.1 Delivery of the goods and arrangements for shipping and clearance obligations, shall be made by the supplier in accordance with the terms specified in the contract.

## **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 SERVICES**

- 13.1 The supplier may be required to provide any or all of the following services, including additional services, if any:
- (a) Performance or supervision of on-site assembly and/or commissioning of the supplied goods;
  - (b) Furnishing of tools required for assembly and/or maintenance of the supplied goods;

- (c) Furnishing of a detailed operations and maintenance manual for each appropriate unit of the supplied goods;
  - (d) 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
  - (e) 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:
- (a) 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;
  - (b) in the event of termination of production of the spare parts:
    - (i) Advance notification to the purchaser of the pending termination, in sufficient time to permit the purchaser to procure needed requirements; and
    - (ii) 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.
- 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 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 promptly by the purchaser, but in no case later than thirty (30) days after submission of an invoice or claim by the supplier.
- 16.4 Payment will be made in Rand unless otherwise stipulated.
- 16.5 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.

## **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. For construction related goods, services and/or infrastructure project, contracts may be expanded or varied by not more than 20%. 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 goods 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 22.2 without the application of penalties.
- 21.5 Upon any delay beyond the delivery period in the case of a goods contract, the purchaser shall, without cancelling the contract, be entitled to purchase goods 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:
- (a) 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;
  - (b) If the supplier fails to perform any other obligation(s) under the contract; or
  - (c) 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 ten (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 purchaser actively associated.
- 23.6 A restriction is imposed, the purchaser must, within five (5) working days of such imposition, furnish the National Treasury, with the following information:
- (a) The name and address of the supplier and / or person restricted by the purchaser;
  - (b) The date of commencement of the restriction;
  - (c) The period of restriction; and
  - (d) 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, 2004 (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 (5) years and not more than ten (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. ANTIDUMPING AND COUNTERVAILING DUTIES AND RIGHTS**

- 24.1 When, after the date of bid, provisional payments are required, or anti-dumping 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 supplier to the purchaser or the purchaser may deduct such amounts from moneys (if any) which may otherwise be due to the supplier in regard to goods 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 –

(a) The parties shall continue to perform their respective obligations under the contract unless they otherwise agree; and

(b) The purchaser shall pay the supplier any monies due the supplier 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 –

- (a) 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
- (b) 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.

**35. PROHIBITION OF RESTRICTIVE PRACTICES**

- 35.1 In terms of section 4(1)(b) (iii) of the Competition Act, 1998 (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, 1998 (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.

## D. APPLICATION OF PREFERENCE POINT SYSTEM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017

The applicable **80/20** preferential points system as set out in Preferential Procurement Regulations, 2017 will be used to evaluate individual tenders.

### Regulation R32 of 20 January 2017 provide for a preference points system


**80/20 Preference point system [(for acquisition of goods or services for a Rand value equal to or above R30,000 and up to R50 million) (all applicable taxes included)]**

The points are awarded as follows:


- 80 points is awarded for the **lowest price** if it complies with the Tender/Formal Written Price Quotation conditions.
- Additional points are awarded for attaining the **B-BBEE status level** of contributor in accordance with the table below:

<b>B-BBEE Status Level of Contributor</b>	<b>Number of Points</b>
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

## E. INVITATION TO BID (MBD 1)

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF MUNICIPALITY/ MUNICIPAL ENTITY)					
Tender number	T 2022/072	Closing date	16/09/2022	Closing time	11:00
Description	CONDUCT AN ASSESSMENT OF ALL RURAL, SOCIAL AND ECONOMIC DEVELOPMENT ACTIVITIES WITHIN THE CAPE WINELANDS DISTRICT MUNICIPALITY AS WELL AS THE FIVE CATEGORY-B MUNICIPALITIES WITHIN THE DISTRICT AND DEVELOP A LONG-TERM FINANCIAL MODEL TO SUPPORT DECISION MAKING DURING THE IDP/BUDGET PROCESS				
<b>THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (MBD7)</b>					
<b>BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE TENDER BOX SITUATED AT: 29 DU TOIT STREET, STELLENBOSCH</b>					
SUPPLIER INFORMATION					
Name of bidder	Palmar Development Group				
Postal address	P O Box 46830, Glosderry, 7702				
Street address	Ubunye House, 70 Rosmead Avenue, Kenilworth, 7708				
Telephone number	Code	021	Number	6711402	
Cell phone number	082-570 4565				
E-mail address	kim@pdg.co.za				
VAT registration number	4850183692				
Tax compliance status	TCS PIN:		OR	CSD No:	MAAA 0003177
B-BBEE status level verification certificate [tick applicable box]	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		B-BBEE status level sworn affidavit		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<b>[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE / SWORN AFFIDAVIT (FOR EMES &amp; QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]</b>					
Are you the accredited representative in South Africa for the goods / services / works offered?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No [If yes enclose proof]		Are you a foreign based supplier for the goods / services / works offered?		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No [If yes, answer part b:3]
Total number of items offered	1		Total bid price		R See price proposal
Signature of bidder			Date		14/09/2022
Capacity under which this bid is signed	Managing Director				
TECHNICAL INFORMATION MAY BE DIRECTED TO:					
Contact person	Jade Swanepoel				
Telephone number	021 888 5147				
E-mail address	jade@capewinelandsgov.za				
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED					
Contact person	Elmine Niemand				
Telephone number	021 888 5175				
E-mail address	elmine@capewinelandsgov.za				

<b>TERMS AND CONDITIONS FOR BIDDING – PART B</b>			
<b>1. BID SUBMISSION:</b>			
1.1	Bids must be delivered by the stipulated time to the correct address. Late bids will not be accepted for consideration.		
1.2	All bids must be submitted on the official forms provided—(not to be re-typed) or online.		
1.3	This bid is subject to the Preferential Procurement Policy Framework Act and the Preferential Procurement Regulations, 2017, the General Conditions of Contract (GCC) and, if applicable, any other special conditions of contract.		
<b>2. TAX COMPLIANCE REQUIREMENTS</b>			
2.1	Bidders must ensure compliance with their tax obligations.		
2.2	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.		
2.3	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 <a href="http://www.sars.gov.za">website www.sars.gov.za</a> .		
2.4	Foreign suppliers must complete the pre-award questionnaire in part b:3.		
2.5	Bidders may also submit a printed TCS certificate together with the bid.		
2.6	In bids where consortia/joint ventures/sub-contractors are involved, each party must submit a separate TCS certificate/pin/CSD number.		
2.7	Where no TCS is available but the bidder is registered on the central supplier database (CSD), a CSD number must be provided.		
<b>3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS</b>			
3.1	Is the entity a resident of the republic of South Africa (RSA)?	Yes	No
3.2	Does the entity have a branch in the RSA?	Yes	No
3.3	Does the entity have a permanent establishment in the RSA?	Yes	No
3.4	Does the entity have any source of income in the RSA?	Yes	No
3.5	Is the entity liable in the RSA for any form of taxation?	Yes	No
<p><b>If the answer is "no" to all of the above, then it is not a requirement to register for a tax compliance status system pin code from the South African Revenue Service (SARS) and if not register as per 2.3 above</b></p> <p><b>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.</b></p>			

Signature(s):  .....

Name(s): Kim Walsh .....

Capacity for the Tenderer: Managing Director .....

Date: 14/09/2022 .....

## **F. SPECIAL CONDITIONS OF CONTRACT AND TERMS OF REFERENCE**

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### **1. INTRODUCTION**

Tenders are hereby invited from bidders to conduct an assessment of all Rural, Social and Economic Development activities in the Cape Winelands District Municipality and the five Category-B municipalities within the district. The bidder must develop a long-term financial model to support decision making during the IDP/Budget process.

### **2. BACKGROUND**

The National Development Plan aims to build a capable state in order to improve the performance of service delivery in local government. The current structure and form of government and/or institutional arrangements have specific challenges in terms of service delivery and development. A fragmented approach in planning, resources allocation and implementation exists unintentionally. Fragmented and forced cohesion in the execution of government programmes are currently applied to achieve efficient and effective service delivery.

The District Municipality was endowed the central district role of co-ordination in the Constitution of the Republic of South Africa, 1996 and the Municipal Structures Amendment Act, 2000. The IDP is the key strategic tool that is supported by the spatial development plan and these underpin the District Municipality's ability to provide strategic support as well as to determine its coordination role. The vision of a district municipality is that of a coordinator, an initiator of development and only as a last resort, a provider of services directly to the public. Therefore, matters relating to socioeconomic status, spatial planning, environmental health, environmental management, fire management and disaster management in respect of land use management in the Category-B municipal areas are relevant to the planning of the district municipality. Planning and coordination in the district municipality space includes: local economic development, integrated development planning, tourism promotion, spatial planning, regional solid waste and transport planning. The District Development Model is focusing on building a coherent State that can enable inclusive economic growth, spatial transformation, strategic infrastructure investment and reliable service delivery for all.

The Cape Winelands District Municipality intends to enhance both the governance processes and institutional mechanisms for the district municipality and the Category-B municipalities within the district to encourage government, business, civil society and communities to collaborate on a journey towards sustainable development.

The assessment results must allow the District Municipality to understand the spatial and economic variations of local government within the Cape Winelands District municipal area responding to local conditions as required.

The assessment results must propose practical implementable recommendations, in order to better coordinate Rural, Social and Economic Development activities within the Cape Winelands District municipal area.

### **3. PURPOSE OF TENDER**

- 3.1** To identify and assess all existing and similar Rural, Social and Economic Development activities embarked on in the previous and current Medium-Term Revenue and Expenditure Framework as well as the actual performance over this period in the Cape Winelands District Municipality as well as the five Category-B municipalities within the district.

- 3.2** To develop a long-term financial model that aims to determine the appropriate mix of parameters and assumptions within which the municipality should operate to facilitate budgets of Rural, Social and Economic Development activities which are affordable and sustainable at least 10 years into the future. In addition, it should be able to identify the consequential financial impact of planned projects on the district and the five Category-B municipality's operational budgets.

#### **4. SCOPE OF WORK**

##### **4.1 Project plan**

- 4.1.1** The service provider should conceptualise a project plan, inclusive of the various phases of this project that should encapsulate the approach and methodology on how to address the scope of work. The project plan should address the following areas:

- a) Mandated and non-mandated Rural, Social and Economic Development activities executed by the Cape Winelands District Municipality and Category-B municipalities as well as whether the latter is funded or unfunded.
- b) Duplication of Rural, Social and Economic Development activities within the Cape Winelands District Municipality as well as the Category-B municipalities within the district.
- c) Recommendations on optimal use of public funds
- d) Long-term financial model
- e) Data sources to be utilised for research

##### **4.2 Phase 1: Inception Meeting**

- 4.2.1** The service provider must meet with the role-players and stakeholders. The aim of the inception meeting would be to:

- a) Provide a detailed briefing on project objectives, deliverables, timeframes and contact persons in the district.
- b) Address any areas of clarification required by the service provider's team.
- c) Review the service provider's proposed project plan, methodology and approach to implementing the project.
- d) Provide access to the following documentation of the District Municipality and Category-B Municipalities, but not limited to;
  - i. Integrated development plans
  - ii. Service delivery and budget implementation plans
  - iii. Annual reports
  - iii. Quarterly performance reports
  - iv. Monthly financial reports
  - v. Medium-term revenue and expenditure framework documentation
  - vi. Applicable reports extracted from financial system
  - vii. Any other relevant documentation.
- e) Agree on dates in advance for each of the workshops with the role-players and stakeholders as outlined in the deliverables as indicated under paragraph 6.

- 4.2.2** The service provider must submit a brief inception report within 30 days or as mutually agreed upon after this meeting, outlining the detailed project plan indicating the timeframes of key deliverables as indicated under paragraph 6.



### **4.3 Phase 2: Analysis**

Although all municipalities in the Cape Winelands District area operate within a uniform legislative framework, duplication of projects and inefficiencies may exist. This phase would include the following activities:

#### **4.3.1 A review of the legislative mandate and policy framework of the District and Category-B Municipalities within the District:**

**4.3.1.1** The current constitutional, legislative and policy mandates must be assessed in order to identify and understand all the functions which the District Municipality and Category-B Municipalities are required to perform. Relevant legislation and policies includes, but is not limited to, inter alia:

- (a) Constitution of the Republic of South Africa, 1996,
- (b) Municipal Structures Act,
- (c) Municipal Systems Act,
- (d) Disaster Management Act
- (e) Fire Services Act,
- (f) National Health Act
- (g) National Environmental Management Act
- (h) Budget Related Policies.

**4.3.1.2** This activity will be a desktop study of the relevant legislation and documentation of the Cape Winelands District Municipality and the Category-B municipalities within the district. In addition, an assessment of functions performed by the said municipalities that might be viewed as non-mandated.

#### **4.3.2 Analysis of functional areas and service delivery mix**

**4.3.2.1** Based on the review of the legislative mandate, the functions currently performed by the district and each of the Category-B municipalities should be analysed in relation to what the district and the Category-B municipalities are mandated to perform. All existing Rural, Social and Economic development activities being executed by district and Category-B municipalities should be listed and categorised into mandated and non-mandated projects as well as whether the latter is funded or unfunded for the past and current Medium-Term Revenue and Expenditure Frameworks<sup>1</sup>.

#### **4.3.3 Analysis of Rural, Social and Economic development projects**

**4.3.3.1** List all similar mSCOA<sup>2</sup> Rural, Social and Economic Development projects between the district municipality and local municipalities, in a comparable manner. The projects must be classified according to the lowest posting level of the Project, Item and Region segment as per the mSCOA chart. The project segment e.g. "Community Development Initiatives" should be further broken down into each municipalities own project descriptions, e.g. "Substance abuse program" in the case of Cape Winelands District Municipality, "Drug abuse" in the case of one of the Category-B municipalities, etc. The identified list of mSCOA projects should reflect the audited amounts for the <sup>3</sup>2020/2021 and 2021/2022 financial year or for a longer period as mutually agreed upon as well as the budgeted amounts for the 2022/2023, 2023/2024 and 2024/2025 financial years.

<sup>1</sup> The current financial year and MTREF might move onto a next period, depending on when a contract for this bid will be concluded.

<sup>2</sup> mSCOA (municipal standard chart of accounts) is a uniform and standardised financial transaction classification framework.

<sup>3</sup> The current financial year and MTREF might move onto a next period, depending on when a contract for this bid will be concluded.

**4.3.3.2** The purpose of this analysis should give stakeholders a clear indication of all similar Rural, Social and Economic development mSCOA projects within the Cape Winelands District as well as the five Category-B municipalities.

**4.3.4 Submission of Phase 2 draft report and engagement with the role-players and stakeholders:**

**4.3.4.1** A draft report on Phase 2 must be submitted to the Cape Winelands District Municipality. Thereafter a workshop will be held with all role-players and stakeholders to give feedback on the draft report and to verify that the report provides an accurate reflection of the arrangements in each municipality. The service provider shall amend the Phase 2 draft report if necessary on the basis of feedback received at the engagement.

**4.4 Phase 3: Recommendation on phase 2 report**

Based on the findings of the phase 2 report, the service provider must provide recommendations on how to achieve the following:

- a) Propose recommendations on how Rural, Social and Economic Development activities can be executed in the whole of the Cape Winelands District to achieve optimal use of public funds and maximise service delivery.
- b) Proposed recommendations should adhere to relevant legislation.
- c) Develop a long-term financial model to support decision making during the IDP/Budget process.
- d) The long-term financial model must aim to determine the appropriate mix of parameters and assumptions within which the municipalities should operate to facilitate budgets of Rural, Social and Economic Development activities which are affordable and sustainable at least 10 years into the future.
- e) The long-term financial model should be able to identify the consequential financial impact of planned projects on the district and the five Category-B municipality's operational budgets.
- f) The long-term financial model must be user friendly and test different scenarios by easily importing data.
- g) The long-term financial model should enable the users to select the best possible execution of Rural, Social and Economic Development activities between the Cape Winelands District Municipality and Category-B municipalities in order to prevent duplication and optimise service delivery.

**4.4.1 Submission and presentation of Phase 3 draft report to the role-players and stakeholders:**

A draft report on Phase 3, including the long-term financial model must be submitted to the Cape Winelands District Municipality, after which a presentation will be made to the role-players and stakeholders to give feedback. The service provider shall amend the Phase 3 draft report as well as the long-term financial model on the basis of feedback received from role-players and stakeholders.

#### 4.4.2 Project close-out report

##### 4.4.2.1 Submission of the final report and long-term financial model:

The final report must include an executive summary. The detailed reports for Phases 2 and 3 shall be included as annexures to the final report. The final report will also be accompanied by a presentation in Microsoft PowerPoint or any other relevant programme. Copies of the final report and long-term financial model shall be submitted in a format as mutually agreed upon.

##### 4.4.3 Presentation on final report:

This presentation will be to a broader target of stakeholders, outlining briefly the research objectives, methodology, key findings, options identified and recommendations of the final report and long-term financial model.

#### 5. COMPOSITION OF THE PROJECT TEAM

5.1 The project team to consist of at least the following team members:

- (a) Project Leader
- (b) Manager
- (c) Staff member

5.2 It is not a requirement that the project team should consist of the above mentioned listed team members; hence the same person may fulfill the role of both the project leader and manager on condition that the quality of the final product will not be compromised.

5.3 Please note any additional proposed members for the same role will not score any points for functionality. If under any circumstances more than one team member is proposed in **Returnable Schedule A** for the same role, only the first proposed member will be evaluated.

5.4 Should the person(s) identified in the Returnable Schedule A not be available for the position which they are indicated for the duration of the contract, then a suitable candidate with equal or superior tertiary qualifications and/or similar experience than that of the person which he/she replaces, must be submitted to the District Municipality for consideration and approval.

#### 6. DELIVERABLES

DELIVERABLE	PHASES / ACTIVITY
<b>Deliverable 1</b>	Phase 1: Inception meeting report (Paragraph 4.2)
<b>Deliverable 2</b>	Phase 2: Workshop on Phase 2 draft report and submission of Phase 2 final report (Paragraph 4.3.4)
<b>Deliverable 3</b>	Phase 3: Presentation of Phase 3 draft report and submission of Phase 3 final report together with the long-term financial model (Paragraph 4.4.1)
<b>Deliverable 4</b>	Phase 3: Submission of project close-out report together with the long-term financial model. (Paragraph 4.4.2)
<b>Deliverable 5</b>	Phase 3: Presentation of final report (Paragraph 4.4.3)

## 7. STAKEHOLDERS

- 7.1 It is envisaged that the Cape Winelands District Municipality together with the Category-B municipalities within the Cape Winelands District be regarded as the project lead of this project.
- 7.2 The final list of role players, as indicated by the Cape Winelands District Municipality will be circulated at the inception meeting or as mutually agreed upon between the Cape Winelands District Municipality and service provider.

## 8. EVALUATION CRITERIA

- 8.1 All bids received shall be evaluated in terms of the Municipal Supply Chain Management Regulations, the Preferential Procurement Policy Framework Act no 5 of 2000 and the Preferential Procurement Regulations of 2017.
- 8.2 Bidders will be evaluated on functionality and are required to submit evidence that demonstrate their qualifications and experience in respect of providing the applicable services in order to obtain relevant points during the evaluation process. **For this purpose, returnable schedule A and B must be completed and submitted together with the tender document.**
- 8.3 **Bidders will also be required to submit a project plan and will be evaluated on the proposed approach and methodology to be used in the execution of the project.**
- 8.4 The description of the functionality criteria and the maximum number of bid evaluation points allocated to each criterion is shown in the table below. The total minimum qualifying score for functionality is 78 out of 141.

Section	Criteria	Maximum Score
<b>Section A</b>	Highest qualification of project team	18
	Work experience of project team	42
	Projects of similar nature completed by project team	25
	Experience of entity	21
	Projects of similar nature completed by entity	10
<b>Section B</b>	Approach and methodology of project plan	25
	<b>Maximum score for functionality</b>	<b>141</b>

Points will be allocated according to the tables below:

<b>SECTION A: QUALIFICATIONS AND EXPERIENCE OF PROJECT TEAM AND ENTITY</b>				
<b>CRITERIA</b>	<b>MEMBER</b>	<b>POINTS</b>		<b>MAX POINTS</b>
Highest Qualification  (Certified copies of qualifications and academic results must be attached to the tender and may be confirmed during the evaluation process)	Project leader	Chartered Financial Analyst or CA	10 points	10
		Postgraduate Diploma or equivalent to NQF Level 8 in Economic & Management Sciences or Public Management and financial modelling	9 points	
		Bachelor's Degree or equivalent to NQF Level 7 in Economic & Management Sciences or Public Management and financial modelling	8 points	
		Other relevant qualification NQF Level 7 or lower in financial modelling	7 points	
		Postgraduate Diploma or equivalent to NQF Level 8 in the field of Economic and Management Sciences or Public Management	6 points	
		Bachelor's Degree or equivalent to NQF Level 7 in the field of Economic and Management Sciences or Public Management	5 points	
		Other relevant qualification NQF Level 7 or lower	3 points	
	Manager	Bachelor's Degree or equivalent to NQF Level 7 in Economic & Management Sciences or Public Management and financial modelling	5 points	5
		Other relevant qualification NQF Level 7 or lower and financial modelling	4 points	
		Postgraduate Diploma or equivalent to NQF Level 8 in Economic & Management Sciences or Public Management	3 points	
		Bachelor's Degree or equivalent to NQF Level 7 in the field of Economic & Management Sciences or Public Management	2 points	
		Other relevant qualification NQF Level 7 or lower	1 point	
	Staff member	Bachelor's Degree or equivalent to NQF Level 7 in the field of Economic & Management Sciences or Public Management	3 points	3
Other relevant qualification NQF Level 7		1 point		

		or lower		
<p>Work Experience of Project Team -Illustrating relevance to the scope of work</p> <p>More than one sector may apply if applicable</p> <p>(CV's and Reference letters<sup>4</sup> must be submitted with the tender and may be confirmed during the evaluation process)</p>	Project leader	<b>Local Government Sector experience within the last eight (8) years</b>	14	
		Five projects completed		8 points
		Three to four projects completed		6 points
		Less than three projects completed		4 points
		<b>Public Sector experience other than Local Government Sector experience within the last eight (8) years</b>		
		Five projects completed		4 points
	Three to four projects completed	3 points		
	Less than three projects completed	2 points		
	<b>Other Sector experience within the last eight (8) years</b>			
	Three projects completed	2 points		
	Less than three projects	1 point		
	Manager	<b>Local Government Sector experience within the last eight (8) years</b>	14	
		Five projects completed		8 points
		Three to four projects completed		5 points
		Less than three projects completed		3 points
		<b>Public Sector experience other than Local Government Sector experience within the last eight (8) years</b>		
		Five projects completed		4 points
	Three to four projects completed	3 points		
Less than three projects completed	2 points			
<b>Other Sector experience within the last eight (8) years</b>				
Three projects completed	2 points			
Less than three projects completed	1 point			
Staff member	<b>Local Government Sector experience within the last eight (8) years</b>	14		
	Five projects completed		8 points	
	Three to four projects completed		5 points	
	Less than three projects completed		3 points	
	<b>Public Sector experience other than Local Government Sector experience within the last eight (8) years</b>			
	Five projects completed		4 points	
Three to four projects completed	3 points			
Less than three projects completed	2 points			
<b>Other Sector experience within the last eight (8) years</b>				
Three projects completed	2 points			
Less than three projects completed	1 point			
Projects of similar nature completed by Project team	Project leader	<b>Within the last eight years</b>	10	
		Five projects completed		10 points
		Three to four projects completed		7 points
		Less than three projects completed		3 points

<sup>4</sup> Reference letters must contain the contact details of the proposed team member as well as the client, contract period and scope of work executed.

(CV's and Reference letters must be submitted with the tender and may be confirmed during the evaluation process)	Manager	<b>Within the last eight years</b>		<b>10</b>
		Five projects completed Three to four projects completed Less than three projects completed	10 points 7 points 3 points	
	Staff member	<b>Within the last eight years</b>		<b>5</b>
		Three projects completed Less than three projects completed	5 points 2 points	
Experience of entity -illustrating relevance to the scope of work  (Company profile and reference/appointment letters must be submitted with the tender and may be confirmed during the evaluation process)	Entity	<b>Local Government Sector experience within the last eight (8) years</b>		<b>21</b>
		Five projects completed Three to four projects completed Less than three projects completed	10 points 7 points 3 points	
		<b>Public Sector experience other than Local Government Sector experience within the last eight (8) years</b>		
		Five projects completed Three to four projects completed Less than three projects completed	7 points 5 points 2 points	
		<b>Other Sector experience within the last eight (8) years</b>		
		Five projects completed Three to four projects completed Less than three projects completed	4 points 2 points 1 point	
Projects of similar nature completed by Entity  (Company profile and reference/appointment letters must be submitted with the tender and may be confirmed during the evaluation process)	Entity	<b>Within the last eight years</b>		<b>10</b>
		Five projects completed Three to four projects completed Less than three projects completed	10 points 7 points 3 points	

<b>SECTION B: APPROACH AND METHODOLOGY</b>		
<b>Present a detailed project plan indicating the approach and methodology that will be used in executing the project as per the scope of work</b>		
<b>CRITERIA</b>	<b>POINTS</b>	<b>MAX POINTS</b>
<p>The proposed project plan addresses the below mentioned aspects:</p> <ul style="list-style-type: none"> <li>• Mandated and unfunded mandated Rural, Social and Economic Development activities executed by the Cape Winelands District Municipality and Category-B municipalities within the district</li> <li>• Duplication of Rural, Social and Economic Development activities within the Cape Winelands District Municipality as well as the Category-B municipalities within the district.</li> <li>• Recommendations on optimal use of public funds</li> <li>• Long-term financial model</li> <li>• Data sources to be utilised for research</li> </ul>	<p>Project Plan addresses all five aspects: = 25 points</p> <p>Project Plan addresses four of the five aspects = 20 points</p> <p>Project Plan addresses three of the five aspects = 15 points</p> <p>Project Plan addresses two of the five aspects = 10 points</p> <p>Project Plan addresses one of the five aspects = 5 points</p>	<b>25</b>

**9. PROJECT TIMEFRAMES**

Timeframes for the duration of this contract may be done in consultation with the Cape Winelands District Municipality and must be mutually agreed to between the latter and the service provider.

**10. PERIOD OF TENDER/DURATION**

The award under this bid will be for the period commencing from the date of acceptance of the form of offer up until a period as mutually agreed between the Cape Winelands District Municipality and successful bidder.

**11. REMUNERATION**

**11.1** No upfront payments will be made.

**11.2** Progress payments to the service provider will only be effected as mutually agreed to by the District Municipality and the service provider.

**11.3** Any fees or remuneration are inclusive of Value Added Tax.



11.4 The service provider must submit invoices to the CWDM, after each phase or deliverable has been completed. Payments will only be effected within 30 days from receipt and approval thereof.

## 12. PRICING INSTRUCTIONS

12.1 The prices quoted must include all services as stipulated in the scope of work, including but not limited to travel, stationery and printing cost.

12.2 For proper evaluation purposes it is essential that **the FORM OF OFFER**, be completed in full and signed. Cognisance should be taken that alternative pricing schedules submitted may result in incorrect values utilised for price evaluation purposes due to unintentional administrative oversight.

12.3 Prices quoted must be fixed and valid for the duration of the contract.

12.4 If any of the phases and or deliverables will be rendered at no charge, in such an instance the price should be indicated on the pricing schedule as **R0.00**.

## 13. INSTRUCTIONS FOR COMPLETING BIDS

The following schedules must be completed and returned when submitting the tender:

**Returnable schedules:**

- **Schedule A: Qualifications and experience of project team**
- **Schedule B: Experience of entity**

**RETURNABLE SCHEDULES:**

**SCHEDULE A: QUALIFICATIONS AND EXPERIENCE OF THE PROJECT TEAM**

The bidder shall insert in the spaces provided below a list of the project teams demonstrated past work experience in terms of projects related to the evaluation criteria.

Listed projects with invalid or incorrect contact details for the employer and **information not supplied in the format as requested below might result in NO eligibility points scored in this regard due to unintentional administrative oversight**

QUALIFICATIONS AND EXPERIENCE OF PROJECT TEAM					
PROJECT LEADER	NAME				
	HIGHEST TERTIARY QUALIFICATION				NQF Level
Employer / Client	Sector: Local Government	Contact details	Description of Project	Project period	Page Ref

See pages 4-20  
on Technical proposal.

PROJECT LEADER	NAME				
Employer / Client	Sector: Public	Contact details	Description of Project	Project period	Page Ref

<b>Employer / Client</b>	<b>Sector: Other</b>	<b>Contact details</b>	<b>Description of Project</b>	<b>Project period</b>	<b>Page Ref</b>

MANAGER	NAME				
	HIGHEST TERTIARY QUALIFICATION	NQF LEVEL			
Employer / Client	Sector: Local Government	Contact details	Description of Project	Project period	Page Ref

<b>MANAGER</b>	<b>NAME</b>				
<b>Employer / Client</b>	<b>Sector: Public</b>	<b>Contact details</b>	<b>Description of Project</b>	<b>Project period</b>	<b>Page Ref</b>
<b>Employer / Client</b>	<b>Sector: Other</b>	<b>Contact details</b>	<b>Description of Project</b>	<b>Project period</b>	<b>Page Ref</b>

STAFF MEMBER	NAME				NQF LEVEL
	HIGHEST TERTIARY QUALIFICATION				
Employer / Client	Sector: Local Government	Contact details	Description of Project	Project period	Page Ref

STAFF MEMBER	NAME				
Employer / Client	Sector: Public	Contact details	Description of Project	Project period	Page Ref



STAFF MEMBER	NAME				Page Ref
Employer / Client	Sector: Other	Contact details	Description of Project	Project period	Page Ref

**RETURNABLE SCHEDULES:**  
**SCHEDULE B: EXPERIENCE OF ENTITY**

The bidder shall insert in the spaces provided below a list of the project teams demonstrated past work experience in terms of projects related to the Evaluation criteria.

Listed projects with invalid or incorrect contact details for the employer and **information not supplied in the format as requested below might result in NO eligibility points scored in this regard due to unintentional administrative oversight**

EXPERIENCE OF ENTITY (illustrating relevance to the scope of work)					
Employer / Client	Sector: Local Government	Contact details	Description of Project	Project duration	Page Ref

*See pages 22-28  
of Technical proposal*

Employer / Client	Sector: Public	Contact details	Description of Project	Project duration	Page Ref

Employer / Client	Sector: Other	Contact details	Description of Project	Project duration	Page Ref
<b>EXPERIENCE OF ENTITY (Projects of similar nature completed by entity)</b>					
Employer / Client	Sector: (Local Government, Public or Other)	Contact details	Description of Project	Project duration	Page Ref


SIGNED ON BEHALF OF BIDDER: 

**G. FORM OF OFFER**

---

**OFFER**

The Cape Winelands District Municipality, identified in the acceptance signature block, has solicited offers to enter into a Contract in respect of the following works:

The bidder, identified in the offer signature block, has examined the documents listed in the tender data and addenda thereto as listed in the tender schedules, and by submitting this offer has accepted the Conditions of Tender and offers to perform all of the obligations and liabilities under the contract including compliance with all its terms and conditions according to their true intent and meaning for an amount of be determined in accordance with the conditions of contract identified in the Conditions of Contract.

By the representative of the bidder, deemed to be duly authorized, signing this part of this form of offer and acceptance, the bidder offers to perform all of the obligations and liabilities of the Service Provider under the contract including compliance with all its terms and conditions according to their true intent and meaning for an amount of be determined in accordance with the conditions of contract identified in the Conditions of Contract.

**For proper evaluation purposes it is essential that this specific pricing schedule be completed in full and signed. Alternative pricing schedules will not be accepted**

This offer may be accepted by the Cape Winelands District Municipality by signing the Acceptance part of this form of offer and acceptance and returning one copy of this document to the bidder before the end of the period of validity Stated in the Conditions of Tender, whereupon the bidder becomes the party named as the Service Provider in the Conditions of Contract.

Signature(s):  .....

Name(s): Kim Walsh .....


Capacity for the Tenderer: Managing Director .....

Name of organization: Palmer Development Group (PDo) .....

Name and Signature of Witness: M. Badenhorst  Date: 14/09/2022

**T 2022/072: CONDUCT AN ASSESSMENT OF ALL RURAL, SOCIAL AND ECONOMIC DEVELOPMENT ACTIVITIES WITHIN THE CAPE WINELANDS DISTRICT MUNICIPALITY AS WELL AS THE FIVE CATEGORY-B MUNICIPALITIES WITHIN THE DISTRICT AND DEVELOP A LONG-TERM FINANCIAL MODEL TO SUPPORT DECISION MAKING DURING THE IDP/BUDGET PROCESS**


<b>PRICE SCHEDULE</b>		
<b>Item</b>	<b>Description</b>	<b>Total</b>
1	Deliverable 1: Inception meeting report	R 104 626
2	Deliverable 2: Submission of Phase 2 final report	R 182 931
3	Deliverable 3: Submission of Phase 3 final report together with the long-term financial model	R 261 597
4	Deliverable 4: Submission of project close-out report together with the long-term financial model	R 45 506
5	Deliverable 5: Presentation of final report	R 18 116
	Sub-Total	R 612 756
	15% VAT	R 91 913
	<b>Total Project Cost (All disbursements must be included in the Total Project Cost)</b>	<b>R 704 669</b>

Signature(s):  .....

Name(s): Kim Walsh

Capacity for the Tenderer: Managing Director

Name of organization: PDG

Name and Signature of Witness:  ..... Date: 28.11.22





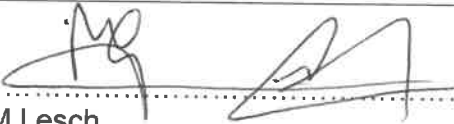
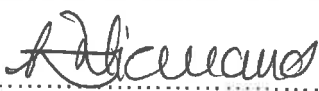
## H. ACCEPTANCE

By signing this part of this form of offer and acceptance, the Employer identified below accepts the Tenderers offer. In consideration thereof, the Employer shall pay the Service Provider the amount due in accordance with the Conditions of Contract identified in the contract that is the subject of this agreement.

Deviations from and amendments to the documents listed in the tender data and any addenda thereto as listed in the tender schedules as well as any changes to the terms of the offer agreed by the tenderer and the Employer during this process of offer and acceptance, are contained in the schedule of deviations attached to, and forming part of this agreement. No amendments to or deviations from said documents are valid unless contained in this schedule, which must be signed by the authorized representative(s) of both parties.

The tenderer shall within two weeks after receiving a completed copy of this agreement, including the schedule of deviations (if any), contact the Employer's agent (whose details are given in the contract data) to arrange the delivery of any bonds, guarantees, proof of insurance and any other documentation to be provided in terms of the conditions of contract identified in the Contract Data at, or just after, the date this agreement comes into effect. Failure to fulfil any of these obligations in accordance with those terms shall constitute a repudiation of this agreement.

Notwithstanding anything contained herein, this agreement comes into effect on the date when the tenderer receives one fully completed original copy of this document, including the schedule of deviations (if any). Unless the tenderer (now Service Provider) within five (5) days of the date of such receipt notifies the Employer in writing of any reason why he cannot accept the contents of this agreement, this agreement shall constitute a binding contract between the parties.

<b>ACCEPTANCE (to be completed by the Cape Winelands District Municipality)</b>	
<b>T 2022/072: CONDUCT AN ASSESSMENT OF ALL RURAL, SOCIAL AND ECONOMIC DEVELOPMENT ACTIVITIES IN THE CAPE WINELANDS DISTRICT MUNICIPALITY AS WELL AS THE FIVE CATEGORY-B MUNICIPALITIES WITHIN THE DISTRICT AS WELL AS TO DEVELOP A LONG-TERM FINANCIAL MODEL TO SUPPORT DECISION MAKING DURING THE IDP/BUDGET PROCESS.</b>	
 ..... Mr M Lesch Director: Budget & Treasury Office	..... 10/02/2023 Date
 ..... Me. E.A. Niemand Witness	..... 10/02/2023 Date



## H. ACCEPTANCE

By signing this part of this form of offer and acceptance, the Employer identified below accepts the Tenderers offer. In consideration thereof, the Employer shall pay the Service Provider the amount due in accordance with the Conditions of Contract identified in the contract that is the subject of this agreement.

Deviations from and amendments to the documents listed in the tender data and any addenda thereto as listed in the tender schedules as well as any changes to the terms of the offer agreed by the tenderer and the Employer during this process of offer and acceptance, are contained in the schedule of deviations attached to, and forming part of this agreement. No amendments to or deviations from said documents are valid unless contained in this schedule, which must be signed by the authorized representative(s) of both parties.

The tenderer shall within two weeks after receiving a completed copy of this agreement, including the schedule of deviations (if any), contact the Employer's agent (whose details are given in the contract data) to arrange the delivery of any bonds, guarantees, proof of insurance and any other documentation to be provided in terms of the conditions of contract identified in the Contract Data at, or just after, the date this agreement comes into effect. Failure to fulfil any of these obligations in accordance with those terms shall constitute a repudiation of this agreement.

Notwithstanding anything contained herein, this agreement comes into effect on the date when the tenderer receives one fully completed original copy of this document, including the schedule of deviations (if any). Unless the tenderer (now Service Provider) within five (5) days of the date of such receipt notifies the Employer in writing of any reason why he cannot accept the contents of this agreement, this agreement shall constitute a binding contract between the parties.

<b>ACCEPTANCE (to be completed by the Cape Winelands District Municipality)</b>	
<b>T 2022/072: CONDUCT AN ASSESSMENT OF ALL RURAL, SOCIAL AND ECONOMIC DEVELOPMENT ACTIVITIES IN THE CAPE WINELANDS DISTRICT MUNICIPALITY AS WELL AS THE FIVE CATEGORY-B MUNICIPALITIES WITHIN THE DISTRICT AS WELL AS TO DEVELOP A LONG-TERM FINANCIAL MODEL TO SUPPORT DECISION MAKING DURING THE IDP/BUDGET PROCESS.</b>	
..... Ms. F.A. du Raan-Groenewald Chief Financial Officer	..... Date
..... Me. E.A. Niemand Witness	..... Date

# I. QUESTIONNAIRE

## List all partners / members / directors of this enterprise

Van / Surname / Ifani	Voornaam / First name / Amagama	ID Nr./No. Inombolo	State Employee Number
Walsh	Kim	7610160180088	N/A
Graham	Nicholas	7910125087083	N/A
Leslie	Milce	8306036791187	N/A
Kola	Nazreen	7906240058082	N/A

other partners are on pg 2

## BROAD-BASED BLACK ECONOMIC EMPOWERMENT (Act 53 of 2003)

**LWI!** Om Voorkeerpunte te eis moet 'n gesertifiseerde afskrif van u Gebalanseerde Breë Basis Swart Ekonomiese Bemagtigings-telkaart voorgelê word tesame met die **MBD 6.1 Eisvorm** vir punte.

**NB!** To claim Preference points a certified copy of your Balanced Broad-Based Black Economic Empowerment Score Card must be submitted with the **MBD 6.1 Claim Form**.

**QAPHELA!** Ukuba ufuna ukwenza ibango lamanqaku akhethekileyo, kufuneka ukuba isicelo sakho sekopi eqinisekisiweyo ye Balanced Broad-Based Black Economic Empowerment Score Card ihambe kunye nefomu eyi **MBD 6.1 Claim Form**.

Vir meer inligting besoek: / For more information please visit: / Inkcukach ezithe vetshe uzakuzifumana aph:

The Department of Trade and Industry: <http://bee.thedti.gov.za/>  
 South African National Accreditation System: <http://www.sanas.co.za/directory.php>  
 Independent Regulatory Board of Auditors: <http://irba.co.za/index.php>

*Palmer Development Group*

Besigheid of persoon se naam:- / Business or person's name:- / Igama leshishini okanye lomntu

- \*\*1.** Persentasie aandeelhouing van persone (HBI) in die besigheid wat histories benadeel is as gevolg van onregverdige diskriminasie gebaseer op **ras**.  
 Percentage of shareholding of persons (HDI) in the business historically disadvantaged because of unfair discrimination based on **race**.  
 Ipersenti yesabelo sabantu kwishishini elalisakuthinteleka ekuxhamleni amalungelo athile ngenxa yobandlululo **ngokobuhlanga**.
- Persentasie aandeelhouing van persone (HBI) in die besigheid wat histories benadeel is as gevolg van onregverdige diskriminasie gebaseer op **geslag**.  
 Percentage of shareholding of persons (HDI) in the business historically disadvantaged because of unfair discrimination based on **gender**.  
 Ipersenti yesabelo sabantu kwishishini elalisakuthinteleka ekuxhamleni amalungelo athile ngenxa yobandlululo **ngokwesini**.
- Persentasie aandeelhouing van persone (HBI) in die besigheid wat histories benadeel is as gevolg van onregverdige diskriminasie gebaseer op **gestremdheid**.  
 Percentage of shareholding of persons (HDI) in the business historically disadvantaged because of unfair discrimination based on **disability**.  
 Ipersenti yesabelo sabantu kwishishini elalisakuthinteleka ekuxhamleni amalungelo athile ngenxa yobandlululo **ngokobulwelwe**.
- Persentasie aandeelhouing van persone geklassifiseer as **jeug**. (18 – 35 Jaar oud).  
 Percentage of shareholding of persons in the business classified as **youth**. (18 – 35 Years old)  
 Ipersenti labantu abanezabelo kwinkonzo zoshishino ababizwa ngokuba **lulutsha** (18 – 35 Yeminyaka)

56,28%

56,28%

0%

0%

5. Is u besigheid geleë binne die jurisdiksie van die Distriksmunisipaliteit? In / Uit

Is your business established within the area of jurisdiction of the District Municipality? In /  Out  
 Ingaba ishishini lakho limi kwingingqi elawulwa nguMasipala wesithili? Ngaphakathi /  Ngaphandle

In/Ngaphakathi  
 Uit/Out/Ngaphandle

6. Maak u gebruik van plaaslike arbeid (werkskepping)? Ja / Nee

Do you make use of local labour (job creation)? Yes / No

Uyawasebenzisa amathuba avelayo odalo lomsebenzi (ukudala umsebenzi)? Ewe / hayi

Ja/Yes/Ewe  
 Nee/No/Hayi

# I. QUESTIONNAIRE

## List all partners / members / directors of this enterprise

Van / Surname / Ifani	Voornaam / First name / Amagama	ID Nr./No. Inombolo	State Employee Number
Rabe	Claus	8010205104087	N/A
Mehl	Karen	6503180169085	N/A
PDB Trust		1T001212/2017(C)	N/A

pg 2

## BROAD-BASED BLACK ECONOMIC EMPOWERMENT (Act 53 of 2003)

**LW!** Om Voorkeerpunte te eis moet 'n gesertifiseerde afskrif van u Gebalanseerde Breë Basis Swart Ekonomiese Bemagtigings-telkaart voorgelê word tesame met die **MBD 6.1 Eisvorm** vir punte.

**NB!** To claim Preference points a certified copy of your Balanced Broad-Based Black Economic Empowerment Score Card must be submitted with the **MBD 6.1 Claim Form**.

**QAPHELA!** Ukuba ufuna ukwenza ibango lamanqaku akhethekileyo, kufuneka ukuba isicelo sakho sekopi eqinisekisiweyo ye Balanced Broad-Based Black Economic Empowerment Score Card ihambe kunye nefomu eyi **MBD 6.1 Claim Form**.

Vir meer inligting besoek: / For more information please visit: / Inkcukach ezithe vetshe uzakuzifumana aph:

The Department of Trade and Industry: <http://bee.thedti.gov.za/>  
 South African National Accreditation System: <http://www.sanas.co.za/directory.php>  
 Independent Regulatory Board of Auditors: <http://irba.co.za/index.php>

Palmer Development Group

### Besigheid of persoon se naam:- / Business or person's name:- / Igama leshishini okanye lomntu

- \*\*1.** Persentasie aandeelhouding van persone (HBI) in die besigheid wat histories benadeel is as gevolg van onregverdige diskriminasie gebaseerd op **ras**.  
 Percentage of shareholding of persons (HDI) in the business historically disadvantaged because of unfair discrimination based on **race**.  
 Ipersenti yesabelo sabantu kwishishini elalisakuthinteleka ekuxhamleni amalungelo athile ngenxa yobandlululo **ngokobuhlanga**. 56,28%
- 2.** Persentasie aandeelhouding van persone (HBI) in die besigheid wat histories benadeel is as gevolg van onregverdige diskriminasie gebaseerd op **geslag**.  
 Percentage of shareholding of persons (HDI) in the business historically disadvantaged because of unfair discrimination based on **gender**.  
 Ipersenti yesabelo sabantu kwishishini elalisakuthinteleka ekuxhamleni amalungelo athile ngenxa yobandlululo **ngokwesini**. 56,28%
- 3.** Persentasie aandeelhouding van persone (HBI) in die besigheid wat histories benadeel is as gevolg van onregverdige diskriminasie gebaseerd op **gestremdheid**.  
 Percentage of shareholding of persons (HDI) in the business historically disadvantaged because of unfair discrimination based on **disability**.  
 Ipersenti yesabelo sabantu kwishishini elalisakuthinteleka ekuxhamleni amalungelo athile ngenxa yobandlululo **ngokobulwelwe**. 0 %
- 4.** Persentasie aandeelhouding van persone geklassifiseer as **jeug**. (18 – 35 Jaar oud).  
 Percentage of shareholding of persons in the business classified as **youth**. (18 – 35 Years old)  
 Ipersenti labantu abanezabelo kwinkonzo zoshishino ababizwa ngokuba **lulutsha** (18 – 35 Yeminyaka) 0 %
- 5.** Is u besigheid geleë binne die jurisdiksie van die Distriksmunisipaliteit? In / Uit  In/Ngaphakathi  
 Is your business established within the area of jurisdiction of the District Municipality? In / Out  In/Out/Ngaphandle  
 Ingaba ishishini lakho limi kwingingqi elawulwa nguMasipala wesithili? Ngaphakathi / Ngaphandle  Uit/Out/Ngaphandle
- 6.** Maak u gebruik van plaaslike arbeid (werkskepping)? Ja / Nee  Ja/Yes/Ewe  
 Do you make use of local labour (job creation)? Yes / No  Nee/No/Hayi  
 Uyawasebenzisa amathuba avelayo odalo lomsebenzi (ukudala umsebenzi)? Ewe / hayi  Nee/No/Hayi



## J. DECLARATION OF INTEREST – (MBD 4 B)

(On behalf of the company and its directors/ members/ trustees/ principal shareholders<sup>2</sup>)

1. No bid/database registration will be accepted from persons in the service of the state<sup>1</sup>.
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/database registration. 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/database registration in respect of owners/shareholders<sup>2</sup> of the company.**

3.1	Full Name of bidder or his or her representative	Kim Walsh	
3.2	Identity Number (person submitting this declaration)	7610160180088	
3.3	Position occupied in the Company (official/director/trustee/shareholder <sup>2</sup> ):	Managing Director /shareholder	
3.4	Company Registration Number	2000/002104/07	
3.5	Tax Reference Number	9581285039	
3.6	VAT Registration Number	4850183692	
3.7	The names of all directors/ members/ trustees/ principle shareholders, their individual identity numbers, personal tax reference numbers and state employee numbers must be indicated in paragraph 4 below		
3.8	Are you or any director/member/trustee/principle shareholder presently in the service of the state?	YES	<input checked="" type="radio"/> NO
3.8.1	If yes, furnish particulars. (Please write in Block Letters. Add separate page if more than one.)		
	SA ID Number:		Relation:
	Surname:	N/A	Persal No:
	Full Names:		
	Organ of State:		Position:
3.9	Have you or any director/member/trustee/principle shareholder been in the service of the state for the past twelve (12) months?	YES	<input checked="" type="radio"/> NO
3.9.1	If yes, furnish particulars. (Please write in block letters. Add separate page if more than one.)		
	SA ID Number:		Relation:
	Surname:	N/A	Persal No:
	Full Names:		
	Organ of State:		Position:

3.10	Do you or any director/ member/ trustee/ principle shareholder have any relationship (family, friend, other) with persons in the service of the state and/or who may be involved with the evaluation and/or adjudication of this or any other prospective bid?	YES	<input checked="" type="radio"/> NO
3.10.1	If yes, furnish particulars. (Please write in block letters. Add separate page if more than one.)		
SA ID Number:		Relation:	
Surname:	N/A	Persal No:	
Full Names:			
Organ of State:		Position:	
3.11	Are you aware of any relationship (family, friend, other) between you or any director/member/trustee/principle shareholder and any persons in the service of the state who may be involved with the evaluation and/or adjudication of this or any other prospective bid?	YES	<input checked="" type="radio"/> NO
3.11.1	If yes, furnish particulars. (Please write in block letters. Add separate page if more than one.)		
SA ID Number:		Relation:	
Surname:	N/A	Persal No:	
Full Names:			
Organ of State:		Position:	
3.12	Is any spouse, child or parent of the company's directors/members/trustees/principle shareholders or stakeholders in the service of the state?	YES	<input checked="" type="radio"/> NO
3.12.1	If yes, furnish particulars. (Please write in block letters. Add separate page if more than one.)		
SA ID Number:		Relation:	
Surname:	N/A	Persal No:	
Full Names:			
Organ of State:		Position:	
3.13	Do you or any director/member/trustee/principle shareholder/stakeholders of this company have any interest in any other related companies or business whether or not they are bidding for this contract.	YES	<input checked="" type="radio"/> NO
3.13.1	If yes, furnish particulars. N/A		
3.14	Is the supplier or any director/member/trustee/principle shareholder listed on the National Treasury's database as a company or person prohibited from doing business with the public sector?	YES	<input checked="" type="radio"/> NO
3.14.1	If yes, furnish particulars. N/A		
3.15	Is the supplier or any director/ member/ trustee/ principle shareholder listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act, 2004 (Act No. 12 of 2004)?	YES	<input checked="" type="radio"/> NO



3.15.1	If yes, furnish particulars.	N/A	
3.16	Was the supplier or any director/member/trustee/principle shareholder 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 (5) years?	YES	<input checked="" type="radio"/> NO
3.16.1	If yes, furnish particulars.	N/A	
3.17	Does the supplier or any director/member/trustee/principle shareholder 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 (3) months?	YES	<input checked="" type="radio"/> NO
3.17.1	If yes, furnish particulars.	N/A	
	The municipality may not do business with individuals/businesses, including that of all the owners/partners/members/directors, whose municipal rates and taxes and/or service charges are in arrears for more than three (3) months unless arrangements have been made with the municipality to settle such arrears. Refer to SCM Regulation 38(d). (Certified copies of your most current accounts/statements and/or proof of any arrangement to be submitted every three (3) months – provide individual information in the schedule under paragraph 4.		
3.18	Was any contract between the supplier 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 checked="" type="radio"/> NO
3.18.1	If yes, furnish particulars.	N/A	

4	<p><b>MFMA Circular No 62 of July 2013</b> require bidders to submit the names of their directors/ trustees/ shareholders, their individual identity numbers, personal tax reference numbers and employee numbers of those who are in the service of the state as defined in the Municipal Supply Chain Management Regulations as part of their bid submissions. <b>A shareholder is defined as 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.</b></p>					
	Full name of directors / trustees / shareholders	Identity Number	% Share-holding in company	Personal Tax Reference Number	State Employee Number (Persal)	Municipal rates & services account numbers (3.17.1) Municipal clearance or most recent service account must be attached as evidence
1	Kim Walsh	7610160180088	10.93	012802493	N/A	214182760
2	Nicholas Graham	791012508783	10.93	02166631150	N/A	213067807
3	Mike Leslie	8306036791187	10.93	797560158	N/A	228359330
4	Nazreen Kala	7906240058082	10.93	0090715160	N/A	555985531
5	Claus Rabe	8010205104087	10.93	2805052160	N/A	224353270
6	Karen Mehl	6803180169085	10.93	1406288140	N/A	221502210
7	PDG Trust	(T001212/2017C)	34.42	1944313186	N/A	
8						
9						
10						

I, the under signed, certify that the information furnished on this declaration form is true and correct. I accept that my/my company's bid/registration may be rejected and in addition to the rejection that action may be taken against me/ my company should this declaration prove to be false.

  
.....  
SIGNATURE

14 September 2022  
.....  
DATE

Managing Director  
.....  
CAPACITY OF SIGNATORY

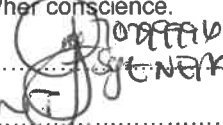
Palmer Development  
Group Pty Ltd  
.....  
NAME OF BIDDER/COMPANY/CC NAME

**MANDATORY SECTION: THIS DECLARATION WILL NOT BE ACCEPTED IF NOT CERTIFIED:**

- <sup>1</sup> MSCM 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.
- <sup>2</sup> "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.

**Commissioner of Oaths**

Signed and sworn to before me at Claremont  
.....  
on this the 14<sup>th</sup> day of SEPTEMBER 2022  
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.

Commissioner of Oaths:   
.....  
Position: Sereenah  
.....  
Address: 60 Imam Haron  
Road, Claremont  
SAPS  
.....  
.....  
Tel: 021-6572240  
.....

Apply official stamp of authority on this page  
CSC

**2022 -09- 14**  
COMMUNITY SERVICE CENTRE  
CLAREMONT K.P. / C.P.  
SOUTH AFRICAN POLICE SERVICE

A. This document is compulsory, in terms of Regulation 44 of the Supply Chain Management Regulations, to do business with any municipality. If not endorsed by a Commissioner of Oaths, or failure to submit it, will disqualify your business from the acquisition process. (Must be submitted annually).

**K. DECLARATION FOR PROCUREMENT ABOVE R10 MILLION (ALL APPLICABLE TAXES INCLUDED (MBD 5))**

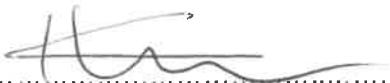
For all procurement expected to exceed R10 million (all applicable taxes included), bidders must complete the following questionnaire:

1.	Are you by law required to prepare annual financial statements for auditing?	YES	<input checked="" type="radio"/> NO
1.1	If yes, submit audited annual financial statements for the past three years or since the date of establishment if established during the past three years. <i>But have attached 3 years statements</i>		
2.	Do you have any outstanding undisputed commitments for municipal services towards any municipality for more than three months or any other service provider in respect of which payment is overdue for more than thirty (30) days?	YES	<input checked="" type="radio"/> NO
2.1	If no, this serves to certify that the bidder has no undisputed commitments for municipal services towards any municipality for more than three months or other service provider in respect of which payment is overdue for more than 30 days.		
2.2	If yes, provide particulars. <i>N/A</i>		
3	Has any contract been awarded to you by an organ of state during the past five (5) years, including particulars of any material noncompliance or dispute concerning the execution of such contract?	YES	<input checked="" type="radio"/> NO
3.1	If yes, furnish particulars <i>N/A</i>		
4	Will any portion of goods or services be sourced from outside the Republic, and, if so, what portion and whether any portion of payment from the municipality / municipal entity is expected to be transferred out of the Republic?	YES	<input checked="" type="radio"/> NO
4.1	If yes, furnish particulars <i>N/A</i>		

**CERTIFICATION**

I, THE UNDERSIGNED (NAME) Kemi Walsh  
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.

  
SIGNATURE

14/09/2022  
DATE

Managing Director  
POSITION

Palmer Development Group  
NAME OF BIDDER  
(PDE)

## L. PREFERENCE POINTS CLAIM FORM (MBD 6.1)

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This document serves as a claim form to qualify for preference points in respect of Broad-Based Black Economic Empowerment (B-BBEE) Status Level of Contribution and must accompany the applicable certificate.

**NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF B-BBEE**

### 1. GENERAL CONDITIONS

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

- (a) 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- (b) the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 (a) The value of this bid is estimated to not exceed R50 000 000 (all applicable taxes included) and therefore the **80/20** preference point system shall be applicable; or

- (b) Either the 80/20 or 90/10 preference point system will be applicable to this tender (*delete whichever is not applicable for this tender*).

1.2 Points for this bid shall be awarded for:

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

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

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

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

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

## 2. DEFINITIONS

- (a) **“B-BBEE”** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- (b) **“B-BBEE status level of contributor”** means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- (c) **“bid”** means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of goods or services, through price quotations, advertised competitive bidding processes or proposals;
- (d) **“Broad-Based Black Economic Empowerment Act”** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- (e) **“EME”** means an Exempted Micro Enterprise in terms of a Code of Good Practice on Black Economic Empowerment issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- (f) **“functionality”** means the ability of a tenderer to provide goods or services in accordance with specifications as set out in the tender documents;
- (g) **“price”** includes all applicable taxes less all unconditional discounts;
- (h) **“proof of B-BBEE status level of contributor”** means:
  - (i) B-BBEE Status level certificate issued by an authorized body or person;
  - (ii) A sworn affidavit as prescribed by the B-BBEE Codes of Good Practice;
  - (iii) 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) **“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

### 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:

$$P_s = 80 \left( 1 - \frac{P_t - P_{min}}{P_{min}} \right) \quad \text{or} \quad P_s = 90 \left( 1 - \frac{P_t - P_{min}}{P_{min}} \right)$$

**Where**

- $P_s$  = Points scored for price of bid under consideration
- $P_t$  = Price of bid under consideration
- $P_{min}$  = Price of lowest acceptable bid

**4.2 FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME-GENERATING PROCUREMENT**

**4.3 POINTS AWARDED FOR PRICE**

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

$$P_s = 80 \left( 1 + \frac{P_t - P_{max}}{P_{max}} \right) \quad \text{or} \quad P_s = 90 \left( 1 + \frac{P_t - P_{max}}{P_{max}} \right)$$

**Where**

- P<sub>s</sub> = Points scored for price of bid under consideration
- P<sub>t</sub> = Price of bid under consideration
- P<sub>max</sub> = Price of highest acceptable bid

**5. POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR**

5.1 In terms of regulation 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

B-BBEE Status Level of Contributor	Number of points (90/10 system)	Number of points (80/20 system)
1	10	20
2	9	18
3	6	14
4	5	12
5	4	8
6	3	6
7	2	4
8	1	2
Non-compliant contributor	0	0

**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 CONTRIBUTOR CLAIMED IN TERMS OF PARAGRAPHS 1.4 AND 4.1**

7.1 B-BBEE Status Level of Contributor: 2 = 18 (maximum of 10 or 20 points)

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



**8. SUB-CONTRACTING**

8.1 Will any portion of the contract be sub-contracted? (*Tick applicable box*)

YES	<input checked="" type="checkbox"/>	NO	<input type="checkbox"/>
-----	-------------------------------------	----	--------------------------

8.1.1 If yes, indicate:

(a) What percentage of the contract will be subcontracted 4,74% & 3.76 %

(b) The name of the sub-contractor Jodi Allemeyer & Robert Hunter

(c) The B-BBEE status level of the sub-contractor 4

(d) Whether the sub-contractor is an EME or QSE? (*Tick applicable box*)

YES	<input checked="" type="checkbox"/>	NO	<input type="checkbox"/>
-----	-------------------------------------	----	--------------------------

(e) Specify, by ticking the appropriate box, if subcontracting with an enterprise

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

**9. DECLARATION WITH REGARD TO COMPANY/FIRM**

9.1 Name of company/firm: Palmer Development Group (PDG)

9.2 VAT registration number: 4850183692

9.3 Company registration number: 2000/002104/07

**9.4 TYPE OF COMPANY/ FIRM [TICK APPLICABLE BOX]**

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

**9.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES**

PDG is a firm that provides research, policy, strategic planning + management support to the public sector.

**9.6 COMPANY CLASSIFICATION [TICK APPLICABLE BOX]**

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

**9.7 MUNICIPAL INFORMATION**

We lease our premises from Subway Trading but have included their account

Municipality where business is situated: Cape Town

Registered Account Number: 210895945 and 210895952

Stand Number: 150014

9.8 Total number of years the company/firm has been in business: 32 years

9.9 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBE status level of contributor indicated in paragraphs 1.4 and 6.1 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I / we acknowledge that:

- (a) The information furnished is true and correct;
- (b) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- (c) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 6.1, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;
- (d) If the B-BBEE status level of contributor has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –
  - (i) disqualify the person from the bidding process;
  - (ii) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
  - (iii) 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;

- (iv) recommend that the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury from obtaining business from any organ of state for a period not exceeding ten (10) years, after the *audi alteram partem* (hear the other side) rule has been applied; and
- (v) forward the matter for criminal prosecution.

WITNESSES

1. U. Bealt

2. [Signature]

[Signature]

SIGNATURE(S) OF BIDDER(S)

14/09/2022

DATE

Ubunye House

70 Rosmead Avenue

Kenilworth, 7708

ADDRESS

**M. CONTRACT FORM – PURCHASE OF GOODS/WORKS OR RENDERING OF SERVICES (MBD 7.2)**

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

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

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

1. I hereby undertake to render services described in the attached bidding documents to (name of the institution)..... in accordance with the requirements and task directives / proposals specifications stipulated in Bid Number..... at the price/s quoted. My offer/s remain binding upon me and open for acceptance by the Purchaser during the validity period indicated and calculated from the closing date of the bid.
  
2. The following documents shall be deemed to form and be read and construed as part of this agreement:
  - (a) Bidding documents, viz
    - (i) Invitation to bid;
    - (ii) Tax clearance certificate;
    - (iii) Pricing schedule(s);
    - (iv) Filled in task directive/proposal;
    - (v) Preference claims for Broad Based Black Economic Empowerment Status Level of Contribution in terms of the Preferential Procurement Regulations 2011;
    - (vi) Declaration of interest;
    - (vii) Declaration of Bidder's past SCM practices;
    - (viii) Certificate of Independent Bid Determination;
    - (ix) Special Conditions of Contract;
  - (b) General Conditions of Contract; and
  - (c) Other (specify)
  
3. I confirm that I have satisfied myself as to the correctness and validity of my bid; that the price(s) and rate(s) quoted cover all the services specified in the bidding documents; that the price(s) and rate(s) cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.
  
4. I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this agreement as the principal liable for the due 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 .....

Capacity .....

Signature .....

Company name .....

Date .....

Witness 1 ..... Date .....

Witness 2 ..... Date .....

*N/A at  
this stage.*

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

1. I M Lesch in my capacity as Director, Budget and Treasury Office accept your bid under reference number T 2022/072 dated 16 September 2022 for the rendering of services indicated hereunder and/or further specified in the annexure(s).
2. An official order indicating service delivery instructions is forthcoming.
3. I undertake to make payment for the services rendered in accordance with the terms and conditions of the contract, within thirty (30) days after receipt of an invoice.

DESCRIPTION OF SERVICE	PRICE (ALL APPLICABLE TAXES INCLUDED)	COMPLETION DATE	B-BBEE STATUS LEVEL OF CONTRIBUTION
T 2022/072: CONDUCT AN ASSESSMENT OF ALL RURAL, SOCIAL AND ECONOMIC DEVELOPMENT ACTIVITIES IN THE CAPE WINELANDS DISTRICT MUNICIPALITY AS WELL AS THE FIVE CATEGORY-B MUNICIPALITIES WITHIN THE DISTRICT AS WELL AS TO DEVELOP A LONG-TERM FINANCIAL MODEL TO SUPPORT DECISION MAKING DURING THE IDP/BUDGET PROCESS.	R 704 669.00	30 June 2023	2

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

Signed at Stellenbosch on 10 February 2023

Name (Print) M Lesch  
 Signature   
 Witness 1  Date 10/02/2023  
 Witness 2  Date 10/02/2023



## N. DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES (MBD 8)

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 of fraud or corruption during the past five (5) years;
  - 3.3 Wilfully neglected, reneged on or failed to comply with any government, municipal or other public sector contract during the past five (5) years; or
  - 3.4 Been listed in the Register of Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act, 2004 (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 audi alteram partem rule was applied).</p> <p>The Database of Restricted Suppliers now resides on the National Treasury's website (<a href="http://www.treasury.gov.za">www.treasury.gov.za</a>) and can be accessed by clicking on its link at the bottom of the home page.</p>	YES	<input checked="" type="radio"/> NO
4.1.1	<p>If so, furnish particulars:</p> <p style="text-align: center;">N/A</p> <p>.....</p> <p>.....</p> <p>.....</p>		
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, 2004 (Act No. 12 of 2004)?</p> <p>The Register for Tender Defaulters can be accessed on the National Treasury's website (<a href="http://www.treasury.gov.za">www.treasury.gov.za</a>) by clicking on its link at the bottom of the home page.</p>	YES	<input checked="" type="radio"/> NO
4.2.1	<p>If so, furnish particulars:</p> <p style="text-align: center;">N/A</p> <p>.....</p> <p>.....</p> <p>.....</p>		



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 (5) years?	YES	<input checked="" type="radio"/> NO
4.3.1	If so, furnish particulars: ..... ..... N/A ..... ..... .....		
4.4	Does the bidder or any of its directors owe any municipal rates and taxes or municipal charges to the municipality / municipal entity, or to any other municipality / municipal entity, that is in arrears for more than three months?	YES	<input checked="" type="radio"/> NO
4.2.1	If so, furnish particulars: ..... ..... N/A ..... ..... .....		
4.3	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 checked="" type="radio"/> NO
4.3.1	If so, furnish particulars: ..... ..... N/A ..... ..... .....		

**CERTIFICATION**

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

14/09/2022  
DATE

Managing Director  
POSITION

Palmer Development Group  
NAME OF BIDDER (PDG)

## O. CERTIFICATE OF INDEPENDENT BID DETERMINATION (MBD 9)

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1. This Municipal Bidding Document (MBD) must form part of all bids<sup>1</sup> invited.
  2. Section 4(1)(b) (iii) of the Competition Act, 1998 (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 *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:
    - 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 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:
- <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.

**CERTIFICATE OF INDEPENDENT BID DETERMINATION**

I, the undersigned, in submitting the accompanying bid:

T2022/072 : Conduct assessment of all rural, social + economic dev. activities within the CWDM as well as 5 category B municipalities...

in response to the invitation for the bid made by: CAPE WINELANDS DISTRICT MUNICIPALITY do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of Palmer Development Group (PDG) 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:
  - 5.1 Has been requested to submit a bid in response to this bid invitation;
    - (a) Could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
    - (b) 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>2</sup> will not be construed as collusive bidding.
7. In particular, without limiting the generality of paragraph 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;

**P. MUNICIPAL RATES AND SERVICES**


Names of Directors / Partners	Physical residential address of the Directors / Partners	Municipal Account Number	Name of Municipality
Kim Walsh	25 Camp Rd Pinebrds 7405	214182760	City of Cape Town
Nichols Graham	11 Jeffcoat Ave Bergvliet 7945	213067807	City of Cape Town
Mike Leslie	11 Lombard Street Claremont 7708	228359330	City of Cape Town
Nazreen Kola	22 Escambe Ave Parktown 2193	555985531	City of Joburg
Claus Rabe	20 Carstens Str Tamboerskloof	224353270	City of Cape Town
Karen Mehl	23 Greenfield Circle Orenj	221502210	City of Cape Town

**NB: Please attach certified copy/copies of the Municipal Account(s)**

**DECLARATION:**

I, the undersigned (name) Kim Walsh

Certify that the information furnished above is correct. I accept that the state may act against me should this declaration prove to be false.

  
SIGNATURE

14/09/2022  
DATE

Managing Director  
POSITION

Palmer Development Group  
NAME OF BIDDER  
CPDG)

- (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, 1998 (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, 2004 (Act No. 12 of 2004) or any other applicable legislation.

  
 .....  
 SIGNATURE

14/09/2022  
 .....  
 DATE

Managing Director  
 .....  
 POSITION

Palma Development Group  
 .....  
 NAME OF BIDDER (PDG)

<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.

**Q. AUTHORITY FOR SIGNATORY**

We, the undersigned, hereby authorize Mr/Mrs .....  
acting in his/her capacity as .....  
of the business trading as .....  
to sign all documentation in connection with Tender.....

Name of members / directors	Signature	Date

Note: If bidders attached a copy of their Authorized Signatory it is not necessary to complete this form.

- See attached letter  
in proposal supporting document  
part -

**R. CREDIT ORDER INSTRUCTION**

It is the policy of the Cape Winelands District Municipality to pay all creditors by means of direct bank transfers. Please complete this information and acquire your banker's confirmation.

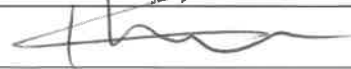
DETAILS OF FIRM / INSTITUTION												
Name	PALMER DEVELOPMENT GROUP											

DETAILS OF MY / OUR BANK ACCOUNT ARE AS FOLLOWS												
NAME OF BANK	FNB											
NAME OF BRANCH	VINEYARD											
BRANCH CODE	250655											
ACCOUNT NUMBER	62011545798											
TYPE OF ACCOUNT	1 = Cheque											
	2 = Savings											

I/we hereby request and authorise the Cape Winelands district municipality to pay any amounts that may accrue to me/us to the credit of my/our bank account.

I/we understand that a payment advice will be supplied by the Cape Winelands District municipality in the normal way that will indicate the date on which funds will be available in my/our bank account and details of payment.

I/we further undertake to inform the Cape Winelands District municipality in advance of any change in my/our bank details and accept that this authority may only be cancelled by me/us by giving thirty (30) days' notice by prepaid registered post.

K. WALSH	
INITIALS AND SURNAME	AUTHORISED SIGNATURE
DATE 14/09/2022	TELEPHONE NUMBER 021-6711402

**FOR BANK USE ONLY**

<p>I/we hereby certify that the details of our clients bank account as indicated on the credit order instruction is correct:</p> <p>See bank verification</p> <p>.....</p> <p>AUTHORISED SIGNATURE</p>	<p><b>OFFICIAL DATE STAMP</b></p> <p>letter attached in proposal supporting document pack</p>
--	---

**FOR FULL SUPPLIER ACCREDITATION ALL PARTS MUST BE COMPLETED AND SIGNED**

## S. COMPULSORY DOCUMENTATION / 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: (Failure to submit this documentation shall lead to disqualification)

<b>Form G - Form of offer</b> Is the form duly completed and signed?	YES	<input checked="" type="checkbox"/>	NO	
<b>Form J – Declaration of Interest (MBD 4)</b> Is the personal declaration from each and every owner / member / director duly completed, certified and signed?	YES	<input checked="" type="checkbox"/>	NO	
<b>Form K – Certificate of Independent Bid Determination (MBD 9)</b> Is the form duly completed and signed?	YES	<input checked="" type="checkbox"/>	NO	
<b>Form L – Preference Points Claim – (MBD 6.1)</b> Is the form duly completed and signed?	YES	<input checked="" type="checkbox"/>	NO	
<b>Form M - Contract Form</b> Is the form duly completed and signed?		<input checked="" type="checkbox"/>		
<b>Form N – Municipal Rates and services</b> Is a certified copy of the <b>bidder's and those of its director's</b> municipal accounts (for the Municipality where the bidder pays his account) for the month preceding the tender closure date attached?	YES	<input checked="" type="checkbox"/>	NO	
<b>Form O – Authority for Signatory</b> Is the form duly completed and is a certified copy of the resolution attached?	YES	<input checked="" type="checkbox"/>	NO	
<b>Form P – Declaration of Past Supply Chain Practices (MBD 8)</b> Is the form duly completed and signed?	YES	<input checked="" type="checkbox"/>	NO	
<b>Tax Compliance Status</b> Is your unique personal identification number (pin) issued by SARS attached?	YES	<input checked="" type="checkbox"/>	NO	

### Additional documents applicable to this specific tender:

<b>Two-envelope</b> Is your proposal structured according to the two-envelope specifications?	YES	<input checked="" type="checkbox"/>	NO	
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**Failure to submit the following certificate will not lead to disqualification, but the tenderer will score 0 points for B-BBEE during the evaluation of tender offers.**

<b>B-BBEE Certificate</b> Is a certified copy of the B-BBEE or Original certificate attached?	YES	<input checked="" type="checkbox"/>	NO	
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I, Kem Walsh confirm that all compulsory documents for this tender is duly completed, signed and attached to this document.

Signature: [Signature] Date: 14/09/2022



## T. REFERENCES

This schedule is to determine the capability of the bidder to execute the contract.

All bidders must provide proof of their ability to render the services applicable to the deliverables as explained in this tender and it must be submitted with the Bid or within a reasonable timeframe to be agreed upon between the Cape Winelands District Municipality and the successful service provider.

Company Name	National Treasury
Description of project	Assessment of viability of mun. in NCTEC
Contact person name	Sadash Ramjathan
Contact person telephone number	071-6817244
Value of project	R1360 286 ex VAT

Company Name	SACN
Description of project	State of City Finance Report 2022
Contact person name	Danya Mughagho
Contact person telephone number	011-4076471
Value of project	R443 182 ex VAT

Company Name	Cape Winelands DM
Description of project	District Funding Research Initiative
Contact person name	Fiona du Raan-Groenewald
Contact person telephone number	021 888 5277
Value of project	R1335 667 ex VAT