TENDER DATA

<table>
<tr><td>1.</td><td>The Employer is:
Thembisile Hani Local Municipality
Private Bag X 4041
Empumalanga
0458</td></tr>
<tr><td>2.</td><td>Tender Documents</td></tr>
<tr><td></td><td>Tendering Procedures
Tender notice and invitation to tender
Tender data

Returnable Documents
List of Returnable Documents

The Contract
Agreements and Contract data
Forms of Offer and Acceptance
Contract Data

Pricing Data
Pricing Instruction
Bill of Quantities

Terms of Reference
Terms of Reference

Additional Relevant Documents
Supply Chain Management Policy</td></tr>
<tr><td>3.</td><td>Interpretation

The tender data and additional requirements contained in the tender schedules that are included in the returnable documents are deemed to be part of these tender conditions.</td></tr>
<tr><td>4

4.1</td><td>Communication.

The Employer’s Representative is;

<table>
<tr><td><u>Accounting Officer:</u>
Mr. D.J.D Mahlangu
Private Bag X 4041
Empumalanga
0458
Tel: 013 986 9100</td><td><u>Procurement Eng.</u>
Supply Chain Unit
Private Bag X 4041
Empumalanga
0458
Tel: 013 986 9233</td><td><u>Technical Enquiries.</u>
Mr. R Makhubele
Private Bag X 4041
Empumalanga
0458
Tel : 013 986 9198</td></tr>
</table>
Attention is drawn to the fact that verbal communication given by the Employer’s representative prior to the close of tenders will not be regarded as binding on the employer. Only information issued formally by the employer in writing to the tenders, under the signature of the Accounting Officer will be regarded as amending the tender documents.</td></tr>
</table>

4.2 **Eligibility Criteria and Requirements**

Only those tenderers who satisfy the following eligibility criteria are eligible to submit tenders:

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

Only those tenderers who score a minimum score of **68 points** in respect of the following functionality criteria will proceed to the price and preference goals.

Summary of Functionality	
Professional Service Team	20
Company Track Record	20
Professional Standing and Institutional Accreditations	20
Methodology	20
Financial Capability	10
Total	**90**

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

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

6 **Tenderer Obligations**

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

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

6.3	If a Tenderer , or any person employed by him is found to have either directly or indirectly, promised or given to any person in the employment of Council, any commission, gratuity, gift or other consideration, The Council shall have the right to summarily and without recourse to law and without prejudice to any other legal remedy which it may have in regard to any loss and/ or additional costs or expenses, to disqualify the Tender or cancel the Contract without paying any compensation to the aforesaid Tender or Contract.
6.4	At the request of the Municipal Manager or his authorised representative from furnishing him with additional information, or with a sample or specimen for testing purposes or otherwise, or from giving a demonstration so as to enable the recommendation to the Council's responsible Committee on the award of the contract be formulated,
7.	**Proof of warrantee** None
8	**Compensation of tendering** The employer will not compensate the tenderer for any costs incurred in the preparation and submission of a tender offer, including the cost of any testing necessary to demonstrate that aspects of the offer satisfy requirements.
9	**Check documents** The Tenderer should check the tender documents on receipt for completeness and notify the employer of any discrepancy or omission. **Thembisile Hani Local Municipality reserves the right to request the bidder to submit original documents (as detailed in the proposed key personnel of the tender document and but not limited to, company CK document, qualifications of key personnel, as well as the BBB-EE certificate) for review and certification by its Commissioner of Oath.**
10.1	**Confidentiality and Copyright of Documents.** Treat as confidential all matters arising in connection with the tender. Use and copy the documents issued by the employer only for the purpose of preparing and submitting a tender offer in response to the invitation. **In submitting any information or documentation requested in this tender or any other information that may be requested pursuant to this Tender, you are consenting to the processing by THLM or its stakeholders of your personal information and all other personal information contained therein, as contemplated in the Protection of Personal Information Act, No.4 of 2013 and Regulations promulgated thereunder ("POPI Act"). Further, you declare that you have obtained all consents required by the POPI Act or any other law applicable. Thus, you hereby indemnify THLM 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 you submit.**

10.2	**Clarification Meeting** None
11	**Submitting tender offer:**
11.1	No Tender document will be considered unless submitted on Council's Official Tender Document
11.2	Return all the returnable documents to the employer after completing them.
11.3	The employer's address for delivery of tender offers and identification details to be shown on such tender offer package are: **Location of tender box:** Thembisile Hani Local Municipality **Physical address :** Stand no 24, Corner Police Station Kwaggafotein C , Empumalanga Telephonic, telegraphic, telex, facsimile or emailed tenders will not be considered
11.4	All tender received by the Thembisile Hani Local Municipality will remain in the Municipality's possession until after the stipulated closing date and time.
11.5	Accept that a tender submitted to the employer cannot be withdrawn or substituted. No substitute tenders will be considered
12.	**Closing Time: 12h00**
12.1	The time and location for opening of the Tender offers are: Closing Time: **12:00pm** Closing Date: **14 December 2026** Location: **Thembisile Hani Local Municipality** **Stand No. 24** **Corner Police Station** **Kwaggafontein C** **Empumalanga** **0458**
12.2	After the opening of the tender proposals, no information relating to the clarification, determination of responsiveness, evaluation and comparison of tender proposals and recommendations concerning the award of the tender shall be disclosed to any other tenderer or persons not concerned with such process until the award of the Tender has been announced by the THLM.
13.	**Pricing the tender** State the rates and prices in Rand **NB: Should exchange rates and price fluctuations, bidders affect prices should take forward cover and this be incorporated in the price tendered.**

14.	**Alterations to the Tender Documents.** **No** alterations may be made to the tender document issued by the employer. Proposals and any other supporting documents must be attached to the back of this tender document
15	**Alternative tender offer.** **No** alternative tender offers will be considered or accepted Alternative offers may be submitted only if a main tender offer, strictly in accordance with all the requirements of the tender document is also submitted. The alternative tender offer is to be submitted with the main tender offer together with a schedule that compares the requirements of the tender document with the alternative requirements the tenderer proposes.
16	**Tender Offer Validity** The Tender offer validity period is **120 days** from the closing date.
17	**Tender clarification after submission**
	A tender may be regarded as non-responsive if the tenderer fails to provide clarification requested by the employer within the time for submission stated in the employer's written request.
18 18.1 18.2 18.3	**Tender evaluation points** The value of this bid is estimated not to exceed R50 000 000 (all applicable taxes included) and therefore the 80/20 system shall be applicable. Preference points for this bid shall be awarded for: (a) Price; and (b) B-BBEE Status Level of Contribution. The maximum points for this bid are allocated as follows: **POINTS** PRICE 80 SPECIFIC GOALS 20 **Total points for Price and Specific Goals must not exceed 100**

19. **Evaluation of Tenders**

The Tenderers notice is drawn to the fact that the evaluation, adjudication and awarding of this tender will be in terms of the Supply Chain Management Policy of the THLM.

19.1 **The following steps will be followed in evaluation;**

1. Determination of whether or not tender offers are complete.
2. Determination of whether or not tender offers are responsive.
3. Determination of the reasonableness of tender offers.
4. Confirmation of the eligibility of preferential points claimed by tenderers.
5. Awarding of points for financial offer.
6. Ranking of tenderers according to the total points
7. Performance of risk analysis by checking the credit record of the tenderers

19.2

Summary of Functionality	
Professional Service Team	20
Company Track Record	20
Professional Standing and Institutional Accreditations	20
Methodology	20
Financial Capability	10
Total	**90**

Tenders are adjudicated in terms of THLM Supply Chain Management Policy, and the following framework is provided as a guideline in this regard.

19.3.1	**Technical adjudication and General Criteria** ▪ Tenders will be adjudicated in terms of inter alia: ▪ Compliance with Tender conditions ▪ Technical specifications If the Tenderer does not comply with the Tender Conditions, the Tenderer may be rejected. If technical specifications are not met, the Tender may also be rejected. With regard to the above, certain actions or errors are unacceptable and warrants **REJECTION OF THE TENDER**, for example ▪ Pages to be completed, removed from the Tender document, and have therefore not been submitted. ▪ If tender document is not fully completed as required and as stipulated in the tender data. ▪ If any tender document is tempered with or it is unbinded or unbundled. ▪ Failure to complete the schedule of quantities as required – only lump sums provided. ▪ Scratching out without initialling next to the amended rates or information. ▪ If tender documents are not original, i.e scanned or copied. ▪ Writing over / painting out rates / the use of tippex or any erasable ink, e.g. pencil. ▪ Failure to attend compulsory site inspections ▪ The Tender has not been properly signed by a party having the authority to do so, according to the **Form D – "Authority for Signatory"** ▪ A Resolution by a Board of Directors of the Company authorizing the Tenderer to sign the Tender document on behalf of the Company. No authority for signatory submitted. ▪ Particulars required in respect of the Tender have not been provided – non-compliance of Tender requirements and/or specifications. ▪ The Tenderer's attempts to influence, or has in fact influenced the evaluation and/or awarding of the contract. ▪ The Tender has been submitted after the relevant closing date and time ▪ Failure to complete and sign Form C1.1 Form of Offer and Acceptance ▪ If any municipal rates and taxes or municipal service charges owed by that Tenderder or any of its directors to the municipality, or to any other municipality or municipal entity, are in arrears for more than three months. ▪ If any Tenderer who during the last five years has failed to perform satisfactorily on a previous contract with the municipality or any other organ of state after written notice was given to that Tenderder that performance was unsatisfactory. ▪ Tax Compliance Status documents with PIN. ▪ Each company within the Joint Venture / Consortium must attach their Tax Compliance Status documents with SARS verification PIN together with Certified copies of directors ID. ▪ Copy of company registration documents. ▪ Copy of latest municipal account which is not more than 1 months old at the time of closing.

	▪ The bidding entity as well as all its directors must submit Municipal account which is not more than three (3) months in arrears or valid lease agreement which is in the name of the business and or the directors, which must stipulate the responsibility of payment of municipal services. ▪ Central Supplier Database (CSD) registration summary report with tax and BBBEE compliant status ▪ Completed and Signed Schedule of Quantities
19.3.2	**Size of enterprise and current workload** ▪ Evaluation of the Tenderer's position in terms of: ▪ Previous and expected current annual turnover ▪ Current contractual obligations ▪ Capacity to execute the contract
19.3.3	**Staffing profile** Evaluation of the Tenderer's position in terms of: ▪ Staff available for this contract being Tendered for ▪ Qualifications and experience of key staff to be utilised on this contract.
19.3.4	**Proposed Key Personnel** In this part of the tender, the Tenderer shall also supply Curriculum Vitae (CV's) for the Staff available named and working on full time basis for the Tenderer. The CV should follow the normal Professional Format as used by Professional Service Providers. Each CV should give at least the following: o Position in the firm and within the organisation of this assignment o PDI status (describing population group, gender and disabilities) o Educational qualifications o Professional Registrations o Relevant experience (actual duties performed, involvement and responsibility), including locations, dates and durations of assignments, starting with the latest. o Language proficiency and o References (company name, individual name, position held, contact details) Much importance will be placed on the experience of the staff proposed. The Tender must ensure that, if selected, the nominated staff will be assigned as proposed. Failure to do so may result in the annulment of any acceptance of the Tenders' proposal and/ or Agreement entered into by the Client for the execution of the services
19.3.5	**Previous experience** The procedure for the evaluation of responsive Bids will be on the average of the **previous three projects** where the firm was involved

	The tenderer shall list in the appropriate Forms the appropriate related projects undertaken by the member firms of the tenderer within the last five (5) years. Evaluation of the Tenderer's position in terms of his previous experience. Emphasis will be placed on the following: ▪ Experience in the relevant technical field ▪ Experience of contracts of similar size ▪ Some or all of the references will be contacted to obtain their input**.**
19.3.6	The tenderer shall provide documentation of company experience of each member of the Consortium/Joint Venture related projects.
19.3.7	**Financial ability to execute the contract:** Evaluation of the Tenderer's financial ability to execute the contract. Emphasis will be placed on the following: ▪ Proof of warrantee ▪ Contact the Tender's bank manager to assess the Tenderer's financial ability to execute the contract and the Tenderer hereby grants his consent for this purpose.
19.3.8	**Good standing with SA Revenue Services** ▪ Determine whether an original valid Tax Pin certificate has been submitted. ▪ The tenderer **must affix a valid Tax verification PIN from SARS.**
19.3.9	If the Tender does **not** meet the requirements contained in the THLM Procurement Policy, and the mentioned framework, it will be rejected by the Council, and may not subsequently be made acceptable by correction or withdrawal of the non-conforming deviation or reservation
19.3.10	**Penalties** The Thembisile Hani Local Municipality will if upon investigation it is found that a preference in terms of the Act and these regulations has been obtained on a fraudulent basis, or any specified goals are not attained in the performance of the contract, on discretion of the Municipal Manager, one or more of the following penalties will be imposed: ▪ Cancel the contract and recover all losses or damages incurred or sustained from the Tenderer. ▪ Impose a financial penalty at the discretion of Council ▪ Restrict the contractor, its shareholders and directors on obtaining any business from the Thembisile Hani Local Municipality for a period of 5 years

20	**The additional conditions of Tender are:** 1 Thembisile Hani Local Municipality may also request that the Tenderer provide written evidence that his financial, labour and resources are adequate for carrying out the project. 2 The Thembisile Hani Local Municipality reserves the right to appoint a firm of chartered accountants and auditors and / or execute any other financial investigations on the financial resources of any Tenderer. The Tenderer shall provide all reasonable assistance in such investigations.

FORM EVALUATION SCHEDULE: TENDER COMPLIANCE

Tender Compliance by the Contracting Firm

It must be noted that a total of **45 points** must be obtained by the Contracting Firm in relation to the requirements as mentioned on the table below failure which a tender shall be automatically eliminated from any further evaluation.

Evaluation Criteria	Evaluation Criteria	Elimination Factor	Points obtainable	Points Claimed
Delegation of authority **(Note 01)**	Delegation of authority for signatory signed by senior directors and/or shareholders nominating representative on the project.	Yes	5	
Completing tender document **(Note 02)**	Must initial every page in the tender document, signing and fill the tender document in full.	Yes	5	
Company registration **(Note 03)**	Proof of Company Registration with Companies and Intellectual Property Commission (CIPC) and proof of shareholding.	Yes	5	
Tax PIN Verification **(Note 04)**	Proof of Tax registration and compliance with South African Revenue Services (SARS)	Yes	5	
Municipal account **(Note 05)**	A statement of the municipal account which does not owe municipal services for more than 90 days must be attached.	Yes	5	
Bank Confirmation Letter **(Note 06)**	A proof in the form bank stamped letter from the bank not older than three (3) months confirming the bank account and details.	Yes	5	
CSD report **(Note 07)**	A copy of the CSD summary report of the company which is not older than one (01) month must be attached.	Yes	5	
Regulatory body – Financial Sector Conduct Authority (FSCA) **(Note 08)**	A copy of a valid Financial Sector Conduct Authority (FSCA) certificate must be attached.	Yes	5	
Professional Indemnity Cover **(Note 09)**	Proof of Professional Indemnity cover of R30 million minimum must be attached.	Yes	5	
Total			**45**	

Note 01: Delegation of Authority

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

Note 02: Completing tender document

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

Note 03: Company registration

A proof of company registration in the form of a copy from Companies and Intellectual Property Commission (CIPC) shall be attached including a copy of a certificate for proof of shareholding and the case of a close corporation a member's interest certificate. Failure to attach certificates shall warrant an automatic elimination of tender from any further evaluation.

Note 04: Tax Verification Pin

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

Note 05: Municipal Account

Attach an original or a copy of a municipal utility account not older than **one (1) month** and the account must **not be** in arrears for more 90 days of any of the registered Director(s) **and** Company. Alternatively attach a copy lease agreement, whereby the company is leasing the property its operating from. Failure to attach the municipal account shall warrant an automatic elimination of tender from any further evaluation.

Note 06. Bank Confirmation Letter

Attach proof in the form bank stamped letter from the bank or e-stamped not older than **one (1) month** confirming the bank account and details. Failure to attach the bank confirmation letter shall warrant an automatic elimination of tender from any further evaluation.

Note 07: CSD Report

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

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

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

Note 09: Professional Indemnity insurance

Attach a copy of Professional Indemnity insurance of the company which has a minimum of R 30 million cover must be attached. Failure to attach the proof of professional indemnity insurance shall warrant an automatic elimination of tender from any further evaluation.

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

Person Authorised to sign Tender:

FULL NAME: ……

SIGNATURE: …… DATE: …….

FORM EVALUATION SCHEDULE: PERSONNEL AND PREVIOUS RELATED WORK EXPERIENCE

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

Summary of Functionality	
Professional service team	20
Company track record	20
Professional Standing and Institutional Accreditations	20
Methodology	20
Financial Capability	10
Total	**90**

A firm must obtain a minimum of 68 points out of the 90 points above to be considered for price and Specific Goals evaluation

PROFESSIONAL SERVICE TEAM LEADER **Points Obtainable (20)**

Evaluation criteria	**Minimum required**	**Maximum points obtainable**	**Points claimed**
Professional services team		**20 points**	
ACCOUNTS EXECUTIVE		**10 points**	
Insurance Broker experience (CV)	1 – 3 Years	03	
	4 -6 Years	06	
	7 Years and more	10	
Sub-total: Accounts Executive insurance brokerage experience:		**10**	
CLAIMS ADMINISTRATOR		**10**	
Insurance Broker experience (CV)	1 – 2 years	03	
	3 – 4 years	08	
	5 Years and more	10	
Sub-total: Claims administrator insurance brokerage experience		**10**	
Total:		**20**	

Company Track Record **Points Obtainable (20)**

Evaluation criteria	Minimum requirements/description	Maximum points obtainable	Points claimed
Company track record: Insurance Brokerage Services		**20**	
Companies Experience in Insurance Brokerage services (public and private sector) (Provide proof of the company's previous completed projects which is either in the form of verifiable appointment letters)	3 Clients	02	
	4 Clients	05	
	5 Clients	10	
	6 and more Clients	20	
Sub-total: Company track record in insurance brokerage services		**20**	
TOTAL: COMPANY TRACK RECORD		**20**	

PROFESSIONAL STANDING AND INSTITUTIONAL ACCREDITATIONS Points Obtainable (20)

Evaluation criteria	Maximum points obtainable	Points claimed
Professional Standing and Institutional Accreditations	**20**	
Valid proof of active registration or affiliation with any relevant risk management professional body (e.g., IRMSA, or equivalent)	10	
Valid proof of active registration or affiliation with any relevant financial sector professional body (e.g., FIA, or equivalent)	10	
TOTAL: C. PROFESSIONAL STANDING AND INSTITUTIONAL ACCREDITATIONS	**20**	

METHODOLOGY **Points Obtainable (20)**

Evaluation criteria (The Service Provider to submit a Proposal)	**Maximum points obtainable**	**Points claimed**
Methodology	**20**	
The methodology presented is likely to lead to achievement of the project objectives and/or: • Reporting	5	
• Meeting Schedule	5	
• Industry Advice	5	
• Take into consideration project risks, timelines or other important considerations	5	
TOTAL: METHODOLOGY	**20**	

FINANCIAL CAPABILITY **Obtainable Points (10)**

Evaluation Criteria	**Evaluation Criteria**	**Elimination Factor**	**Points obtainable**	**Points Claimed**
Financial Capability of the bidder (Access to funding and risk management)	The bidder should provide a funding facility/commitment/support letter from a registered financial institution or other acceptable evidence demonstrating its status of a going concern, including Annual Financial Statements where applicable.			
	Financial information demonstrates adequate liquidity or available working capital to meet the contract's documented start-up and operating requirements	No	4	
	Financial information demonstrates sufficient resources or verified financing to sustain service delivery between payment cycles	No	3	
	Financial information demonstrates reasonable financial stability, with no material unresolved concerns affecting contract performance	No	3	
Total			**10**	

TOTAL SCORE: _____/90