



**SOL PLAATJE MUNICIPALITY**  
Directorate: FINANCE

Section: I.T

Contact person: Hein Niemann

Telephone: 053 830 6797

*Documents are obtainable from:*  
*Contract Department, City Hall, 2 Market Square, Kimberley*  
*Telephone: 053 8078482/3/4/5/6/7*

Date: 31 AUGUST 2010

Reference No. "Q084/2010"

**Q084/2010: IT SERVICE MANAGEMENT (ITSM) SYSTEM WITH  
MODULES**

***INVITATION FOR QUOTATIONS FOR ORDERS  
ABOVE R30 000 BUT LESS THAN R200 000***

***ALL QUOTATIONS MUST BE SUBMITTED WITH A COMPLETED  
PREFERENCE POINT SYSTEM PROCUREMENT CERTIFICATE***

***ANY QUOTE WILL NOT NECESSARILY BE ACCEPTED AND THE COUNCIL RESERVES  
THE RIGHT TO ACCEPT THE WHOLE OR ANY PART OF ANY QUOTE***

***QUOTATIONS SUBMITTED BY NON-REGISTERED (DATA BASE) PROVIDERS WILL ONLY BE  
CONSIDERED IF A VALID ORIGINAL TAX CLEARANCE CERTIFICATE  
FROM SARS IS SUBMITTED WITH THIS QUOTATION (FOR AMOUNTS ABOVE R15000.00)***

	<b>Details and Specifications</b>	<b>QUANTITY</b>	<i>Price / each Inclusive of vat &amp; delivery charges</i>	<i>Total price Inclusive of vat &amp; delivery charges</i>
1	IT Service Management (ITSM) System with modules.	1		
<b>NETT TOTAL AMOUNT, R</b>				

***GENERAL CONDITIONS***

- (1) Quotations must be submitted using this official quotation form.
- (2) All quotations must be submitted with a completed Preference point system procurement certificate.
- (3) Price should include value added tax and delivery charges to the Municipal Stores in Industria Road, Ashburnham, Kimberley (unless otherwise stated).
- (4) Any quote will not necessarily be accepted and the Municipality reserves the right to accept the whole or any part of any quote and the bidder scoring the highest number of points will not necessarily be accepted.
- (5) **Preference will be given to Database Suppliers.**
- (6) Quotations submitted by non-registered (data base) providers will only be considered ***if a valid original tax clearance certificate from SARS is submitted with this quotation*** (for amounts

above R15000.00) and if all information is submitted as required in the company profile form attached.

- (7) Quotations submitted by registered providers will only be considered if a copy of proof of registration is submitted with this quotation.
- (8) All quotations will be evaluated on a point system in accordance with the provisions of the Preferential Procurement Policy Framework Act No. 5 of 2000.
- (9) Sealed quotations, outwardly marked: **“Q084/2010: “IT Service Management (ITSM) System with modules”** must be addressed to the **Municipal Manager** and placed in the: **Tender box, Ground Floor, Main Entrance of the City Hall, 2 Market Square, Kimberley** not later than **11:00 on FRIDAY, 10<sup>th</sup> SEPTEMBER 2010.**  
***Quotations will be opened in public in the Boardroom of the City Hall immediately after closing the same day.***
- (10) ***Should pages be omitted from original quote, the quote will be disqualified.***
- (11) Invoices received before the last working day of each month will, as far as possible, be paid not later than the 15<sup>th</sup> day of the following month.

IS YOUR COMPANY REGISTERED AS AN AUTHORISED PROVIDER WITH SOL PLAATJE MUNICIPALITY?  YES  NO

IF YES, PROVIDE REGISTRATION NO. \_\_\_\_\_

DELIVERY TIME \_\_\_\_\_

SETTLEMENT DISCOUNT ALLOWED \_\_\_\_\_% \_\_\_\_\_ DAYS

THESE QUOTED PRICE/S WILL HOLD GOOD UNTIL \_\_\_\_\_

NAME OF BIDDER \_\_\_\_\_

AUTHORISED BY \_\_\_\_\_

NAME OF COMPANY: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

TELEPHONE NO. \_\_\_\_\_ FAX NO. \_\_\_\_\_

E-MAIL ADDRESS \_\_\_\_\_

## **SPECIFICATIONS**

### **1.1 Helpdesk Module that offers the following minimum features:**

Easy submission of service requests via and End-User Portal, hotkey command, or company's website.

Full email-to-service request integration, with all email correspondence saved within the service request.

Automatic routing of service requests according to predefined parameters and priorities.

Escalation rules and prioritization defined by user, due date, urgency, and other fields

Automatic notifications to keep administrators and end-users updated on resolution status

Predefined message templates for issues administrators commonly address

Customizable interface for the sorting of service requests

Customizable alert system to highlight urgent, unresolved, and escalated service requests

Support levels per admin group so that each service request has a maximum support level

Knowledgebase and Quick List items for the easy resolution of technical issues

Permission controls for better management of administrator activity

LDAP integration to stay up-to-date with the latest user information

Customize and issue a survey to end-users when closing a service request to evaluate end-user satisfaction

### **1.2 End-User Portal that offers the following minimum features:**

Easy submission of service requests with instant access to the End-User Portal via hotkey command

Automatic attachment of screenshots to clarify the content of service requests

End-User access to entire service history to track the status of submitted service requests

Pre-populated Quick List templates that end-users can select for common issues

Knowledgebase FAQ section so end-users can independently resolve their own technical issues

Automatic suggestions and resolutions from the Knowledgebase as end-users begin to type in the title of their service requests

End-user participation in ITIL Change Management processes

Easy integration of the End-User Portal directly into your internal website

### **1.3 Knowledgebase Module that offers the following minimum features:**

Automatic or manual addition of common service requests and their resolutions to the system Knowledgebase  
Quick search function to locate service request solutions based on category and subcategory  
Easy attachment of media files to enrich the content of the Knowledgebase item  
Solutions for end-users in the Knowledgebase Self Service Portal  
Automatic suggestions for issue resolution as end-users begin to enter the title of a service request

**1.4 Asset Management Module that offers the following minimum features:**

Automatic detection of all hardware and software in your IT environment  
Automatic deployment of agent software for the local or remote collection of asset information  
Automatic scanning of all machines for an updated inventory including SNMP discovery  
Historical log with a record of all reported changes  
Real-time notifications when software that's not on your list of registered products is installed or if it exceeds your number of purchased license  
See which users are logged in to the network in real time and send broadcast messages, emails, or perform a remote control session  
Extraction and display of license keys for Microsoft products  
Easy integration with external purchasing and order systems via XML  
Tracking of software and supplier catalogues

**1.5 Remote Control Module that offers the following minimum features:**

Anywhere-to-anywhere machine access from within a service request  
All sessions performed via secure web connection  
Communication with remote users via Chat Messaging, SMS, or email  
Access to computers and other machines granted for users working from home or using a remote machine  
Remote control even to a user on a terminal server

**1.6 Reports and Analysis Module that offers the following minimum features:**

Predefined reports for services and assets  
Extensive report capabilities for system data monitoring and cost analysis  
Recording of all calls on log files to support detailed reports  
Extensive customization options to create tailored reports  
Analysis of your helpdesk activity on an up to per-hour basis to identify peak points

**1.7 End User Messaging Module that offers the following minimum features:**

Initiate chat conversations with any end-user logged in to the network  
Manage queues of end-users that have initiated chats  
Access the end-user's entire service history from within the chat conversation  
Create new service requests from within the chat conversation  
Automatic archival of all chat conversations within the end-user's service history  
Initiate remote control session from within the chat conversation  
Download or upload files via a chat session, which will be saved in the chat history

### **1.8 ICT Benchmark Module that offers the following minimum features:**

Automatic conversion of your IT data into statistics and ratios  
Dynamic measurements to benchmark your IT performance  
Local History Chart to track trends over the previous 60 days  
Worldwide Distribution Chart allows you to compare your performance with thousands of other IT departments worldwide  
Analysis for future and more strategic business decisions

### **1.9 Calendar Module that offers the following minimum features:**

Centralized access to all of important IT assignments, dates, and deadlines  
Easily create events in an intuitive interface  
All service request due dates, activities, and software support expiration dates in the Helpdesk should automatically be added to the Calendar  
Automatically synchronize Calendar with Microsoft Exchange

### **1.10 Advanced Monitoring Module that offers the following minimum features:**

Real-time testing of memory usage, hard disk usage, vital OS services and processes, network services, software and hardware updates, and other systems  
Automatic notifications when errors arise via service request, email, or SMS text messages  
"Back to normal" notifications when monitoring events have been resolved  
Set customized monitoring configurations that can include notifications and graphs  
Graphs of monitoring tests on a daily, monthly, weekly, and yearly basis  
Set SNMP traps to receive detailed notifications from your SNMP device  
Monitoring and graphs of incoming and outgoing data activities from computers and SNMP devices  
Receive notifications if data rates exceed specified thresholds  
Monitoring templates to apply to any number of servers or workstations

### **1.11 Projects and Tasks Module that offers the following minimum features:**

Listing and scheduling of tasks and projects  
Gantt charts to view the progress of projects with task grouping per category  
Evaluation of project status with fields that display the progress of each task within the project  
Creation of manual or automatic reoccurring events on a daily, weekly, or monthly basis  
Customizable reoccurring event notifications via service request, email, or text message  
Template projects with multiple tasks for reoccurring events  
Tracking of times and activities with relevant reports  
Assignment of tasks and projects to specific administrators

**1.12 Manager Dashboard Module that offers the following minimum features:**

Immediate graphical overview of your organization's state of affairs  
Wide variety of customizable reports that can be modified or created as new  
Report building wizard for easy creation of customized reports  
Customizable charts that can rotate in a constant slideshow  
Drill-down option on charts to directly access specific data  
Automatic scheduling of reports on assets, workflow, and service quality  
Automatic distribution of reports on a daily, weekly, or monthly basis

**1.13 SLA/SLM Module that offers the following minimum features:**

Create and configure multiple Service Level Agreements (SLAs) for your helpdesk clients  
Specify SLAs for individual users and for companies as a whole  
Define routing rules, priorities, due dates, escalation rules, and operating times for each SLA  
Develop internal goals for helpdesk performance that go beyond your SLAs in order to motivate IT excellence  
Easily grade your performance against individual SLAs and internal goals using our preconfigured measurements, or create your own measurements  
Review your overall helpdesk performance vs. your SLAs and internal goals using metrics from the Service Management dashboard

**1.14 ITIL Problem Management Module that offers the following minimum features:**

Tracking and management of root problem causes to prevent incident

recurrence

Grouping of service request incidents into higher level problems and themes

Multiple problem templates to suit any scenario in the work environment

Detailed problem descriptions and historical log of all changes

Knowledgebase of known errors and workaround methods

Minimization of incident-related business impacts on your business operations

**1.15 ITIL Change Management Module that offers the following minimum features:**

Change creation using built-in basic or advanced change templates

Customized workflow processes and change templates to suit any change scenario

Multi-level risk assessments and authorizations in workflow tabs with a full audit trail

Permissions to ensure that only permitted users view details

Targeted notes, tasks, permission, and automatic notifications for key stakeholders

Tracking, monitoring, and reporting on all past and current change activity

Full control over all planned change activities for minimal business exposure and service disruption

Highly integrated with all ITSM system modules for shared accumulated data processes and functionality

End-user participation in change processes via the End-User Portal

**1.16 ITIL CBMD Module that offers the following minimum features:**

Comprehensive list of organization's Configuration Items

Automatic import of assets, software products, and catalog items

Tracking of the relationships between company assets and IT activities

Storage of an unlimited number of Configuration Items of all types

Visual indicators that show the current state of your CI's

Labeling of CI subtypes with specific icons

More than 250 customizable fields

Prediction of the influence of changes in your network on future developments and business impacts

**SPECIAL CONDITIONS:**

- 1) Quote should include sufficient licenses for 550 desktops/users and 10 administrators and should make provision for all service, support and version upgrades in first year of operation.
- 2) Annual license fees for product should include free version upgrades and support.
- 3) The quote should make provision for the onsite installation and customization of all modules as well as hands on training of Sol Plaatje Municipality ICT Staff to do same.
- 4) Travelling and accommodation to be include in price.
- 5) Only bids that fall within the available project budget will be considered.

***\* FOR OFFICE USE ONLY\****

**AS AGREED BY : -**

LINE/PROJECT MANAGER: \_\_\_\_\_ DATE: \_\_\_\_\_

ACQUISITION MANAGER: \_\_\_\_\_ DATE: \_\_\_\_\_

**APPROVED BY:**

SUPPLY CHAIN MANAGER: \_\_\_\_\_ DATE: \_\_\_\_\_



**LISTING CRITERIA**

**\*PLEASE RETURN IMMEDIATELY WITH QUOTE\***

- 1) **Company Name:** .....
- 2) **Contact Details:** Tel No: ..... Fax No:.....Cell phone No:.....
- 3) **Postal Address:** .....
- 4) **VAT Registered:** Yes  No  **If registered, VAT Registration No:** .....
- 5) **Settlement Discount Allowed:** ..... % for payment within.....days
- 6) **Bank Name:** .....
- 7) **Account No:** ..... **Type of Account:** ..... **Branch code:**.....
- 8) **Location in Sol Plaatje Municipal Area:** Yes  No
- 9) **% owned by black male:**.....% **% owned by black female:** ..... %  
**owned by black youth:** .....%
- 10) **% owned by disabled persons:** .....% **% owned by white female:**..... %
- 11) **Indicate Main Sector/ Please select one only:**  
Agriculture ; Mining and Quarrying ; Manufacturing ; Electricity, Gas, Water ;  
Construction ; Retail & Motor Trade & Repairs ; Wholesale Trade, Commercial Agents and  
Allied Services ; Catering & Accommodation & other Trade ; Transport, Storage &  
Communications; Finance and Business Services ; Community, Social and Personal  
Services
- 12) **Amount of full time employed staff:** ..... **Annual Turnover: R**.....  
**Asset Value (excluding fixed property): R**.....
- 13) **Declaration of Interest:**  
 Are you in the service of the State or have you been in the service of the State (including  
Municipal officials or councillors) in the previous 12 months?  
 Are any close family members (spouse, child or parent) of a director, manager, shareholder or  
stakeholder of your company in the service of the State (including municipal officials or councillors)  
or has been in the service of the State during the previous 12 months?



## **PREFERENCE POINT SYSTEM**

## **PROCUREMENT CERTIFICATE**

Preference point system for procurement with a Rand value equal to or above R30 000 but less than R200 000.

NAME OF FIRM: \_\_\_\_\_

POSTAL ADDRESS: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

TELEPHONE NO: \_\_\_\_\_

CONTACT PERSON: \_\_\_\_\_

APPROVED REGISTRATION NO OBTAINED FROM SPM DATABSE: \_\_\_\_\_

**PREFERENCE POINTS CLAIM FORM IN TERMS OF  
THE PREFERENTIAL PROCUREMENT REGULATIONS 2001  
PURCHASES**

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**METHOD OF POINTS CALCULATION**

The points system used is in accordance with the provisions of the Preferential Procurement Policy Framework Act, No. 5 of 2000.

This preference form must form part of all bids invited. It contains general information and serves as a claim form for Historically Disadvantaged Individuals (HDI's) preference points as well as a summary for preference points claimed for attainment of other specified goals.

N.B. :

BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF EQUITY OWNERSHIP BY HISTORICALLY DISADVANTAGED INDIVIDUALS (HDI'S) AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS 2001

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The following preference point systems are applicable to all quotes:

- 1.1 The following preference point systems are applicable to all quotes: -  
The 80/20 system for requirements with a Rand value of up to R200 000
  
- 1.2 Preference points for this bid shall be awarded for: -  
(a) Price; and  
(b) Specific contract participation goals, as specified in the attached forms
  
- 1.3 Failure on the part of a bidder to fill in and/or to sign this form may be interpreted to mean that preference points are not claimed.
  
- 1.4 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.

# SOL PLAATJE MUNICIPALITY

## METHOD OF POINTS CALCULATION

- 1.5 Preference for being an HDI and/or achieving specified goals will be calculated separately and will be added to the points scored for functionality and prices.

**80/20 Points**

Price	80
HDI and Specific Contract Participation Goals	20

The following formula will be used to calculate the points for price and functionality: -

$$PS = P_c \times \left\{ 1 - \frac{P_t - P_{\min}}{P_{\min}} \right\}$$

Where

$$P_c = 80$$

PS = points scored for price of quote under consideration

$P_t$  = Rand value of offer quote under consideration

$P_{\min}$  = Rand value of lowest acceptable quote

# PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2001

## PURCHASES

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This preference form must form part of all bids invited. It contains general information and serves as a claim form for Historically Disadvantaged Individuals (HDI's) preference points as well as a summary for preference points claimed for attainment of other specified goals.

N.B.: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF EQUITY OWNERSHIP BY HISTORICALLY DISADVANTAGED INDIVIDUALS (HDI'S) AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS 2001

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### GENERAL DEFINITIONS

- 2.1 **“Acceptable bid”** means any bid which, in all respects, complies with the specifications and conditions of bid as set out in the bid document.
- 2.2 **“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, works or services.
- 2.3 **“Black people”** is a generic term which means African, Coloureds and Indians as defined in the Broad – Based Black Empowerment Act (No.53 of 2003).
- 2.4 **“Comparative price”** means the price after the factors of a non-firm price and all unconditional discounts that can be utilised have been taken into consideration.
- 2.5 **“Consortium or joint venture”** means an association of persons for the purpose of combining their expertise, property, capital, efforts, skills and knowledge in an activity for the execution of a contract.
- 2.5 **“Contract”** means the agreement that results from the acceptance of a bid by an organ of state.
- 2.7 **“Specific contract participation goals”** means the goals as stipulated in the Preferential Procurement Regulations 2001.
- 2.7.1 In addition to above-mentioned goals, the Regulations [12.(1)] also make provision for organs of state to give particular consideration to procuring locally manufactured products.
- 2.8 **“Control”** means the possession and exercise of legal authority and power to manage the assets, goodwill and daily operations of a business and the active and continuous exercise of appropriate managerial authority and power in determining the policies and directing the operations of the business.
- 2.9 **“Disability”** means, in respect of a person, a permanent impairment of a physical, intellectual, or sensory function, which results in restricted, or lack of, ability to perform an activity in the manner, or within the range, considered normal for a human being.
- 2.10 **“Equity Ownership”** means the percentage ownership and control, exercised by individuals within an enterprise.
- 2.11 **“Good standing”** means not being blacklisted or involved in illegal activities, must comply with the credit control policy with regard to payments for services and must have satisfactorily complied with present and previous contractual obligations.

## GENERAL DEFINITIONS ( Continue)

2.12 “**Historically Disadvantaged Individual (HDI)**” means a South African citizen

- (1) who, due to the apartheid policy that had been in place, had no franchise in national elections prior to the introduction of the Constitution of the Republic of South Africa, 1983 (Act No 110 of 1983) or the Constitution of the Republic of South Africa, 1993, (Act No 200 of 1993) (“the interim Constitution”); and/or
- (2) who is a female; and/or
- (3) who has a disability;
- (4) who is a youth

provided that a person who obtained South African citizenship on or after the coming to effect of the Interim Constitution, is deemed not to be a HDI;

2.13 “**Management**” means an activity inclusive of control and performed on a daily basis, by any person who is a principal executive officer of the company, by whatever name that person may be designated, and whether or not that person is a director.

2.14 “**Owned**” means having all the customary elements of ownership, including the right of decision-making and sharing all the risks and profits commensurate with the degree of ownership interests as demonstrated by an examination of the substance, rather than the form of ownership arrangements.

2.15 “**Person**” includes reference to a juristic person.

2.16 “**Rand value**” means the total estimated value of a contract in Rand denomination that is calculated at the time of bid invitations and includes all applicable taxes and excise duties.

2.17 “**Small, Medium and Micro Enterprises (SMMEs)**” bears the same meaning assigned to this expression in the National Small Business Act, 1996 (No 102 of 1996).

2.18 “**Sub-contracting**” means the primary contractor’s assigning or leasing or making out work to, or employing another person to support such primary contractor in the execution of part of a project in terms of the contract.

2.19 “**Trust**” means the arrangement through which the property of one person is made over or bequeathed to a trustee to administer such property for the benefit of another person.

2.20 “**Trustee**” means any person, including the founder of a trust, to whom property is bequeathed in order for such property to be administered for the benefit of another person.

**PREFERENTIAL, HDI AND SPECIFIC GOALS BALANCED SCORECARD:  
(80/20 PREFERENCE POINT SYSTEM)**

**IMPORTANT: -**

**Failure on the part of a bidder to complete this section shall be interpreted to mean that the preference points for the following equity ownership by HDI and/or achieving the following goals are not claimed.**

**Penalty: -**

**Upon detecting any false claim or statement hereunder will result in the bidders de-registration and the bidder will be prevented from participation in future contracts for a period of three (3) years.**

**(1) Shareholding by HDI**

(See General Definitions in this document)

	<b>Description</b>	<b>Maximum Points</b>	<b>Percentage Ownership (%)</b>	<b># (See below) Percentage involvement of individuals Exercising control over Enterprise and are Shareholders (%)</b>
1.1	"Black People" Percentage Points" (See General Definitions in this document)	<b>10</b>		
1.2	Gender, percentage Ownership by Female Individuals.	<b>2</b>		
1.3	Disablement, percentage Ownership by Disables Individuals	<b>2</b>		
1.4	Youth, percentage Ownership by Youth	<b>2</b>		

**(2) Specific Goals**

	<b>Description</b>	<b>Maximum Points</b>	<b>Mark if applicable</b>
1.1	Enterprise operating within the Frances Baard District Area	<b>4</b>	

**Signature of Bidder:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**# CONTROL is the power to govern the financial and operating policies of an enterprise so as to obtain benefits from its activities and INVOLVEMENT refers to the degree / percentage active involvement in the day to day activities of the enterprise. Therefore the percentage indicated must be the percentage active involvement of individuals who have control over the enterprise and are shareholders.**

**# The Equity Ownership will be equated to the percentage active involvement for scoring and evaluating points.**

**\* FOR OFFICE USE ONLY\***

<b>AS AGREED BY: -</b>	
LINE/PROJECT MANAGER: _____	DATE: _____
ACQUISITION MANAGER: _____	DATE: _____
<b>APPROVED BY:</b>	
SUPPLY CHAIN MANAGER: _____	DATE: _____

## **METHOD OF POINTS CALCULATION (Continued)**

### **ESTABLISHMENT OF HDI EQUITY OWNERSHIP IN AN ENTERPRISE**

Equity ownership shall be equated to the percentage of an enterprise which is owned by individuals classified as HDI's, or in the case of a company, the percentage shares that are owned by individuals classified as HDI's, who are actively involved in the management and daily business operations of the enterprise and exercise control over the enterprise, commensurate with their degree of ownership.

Where individuals are not actively involved in the management and daily business operations and do not exercise control over the enterprise commensurate with their degree of ownership, equity ownership may not be claimed.

### **ADJUDICATION USING A POINT SYSTEM**

The bidder obtaining the highest number of points **may** be awarded the contract.

Preference points shall be calculated after prices have been brought to a comparative basis.

Points scored will be rounded off to 2 decimal places.

In the event of equal points scored, the bid **will** be awarded to the bidder scoring the highest number of points for specified goals.

### **POINTS AWARDED FOR HISTORICALLY DISADVANTAGED INDIVIDUALS**

Equity claims for a trust will only be allowed in respect of those persons who are both trustees and beneficiaries and who are actively involved in the management of the trust.

Documentation to substantiate the validity of the credentials of the trustees contemplated above must be submitted.

Listed companies and tertiary institutions do not qualify for HDI preference points.

A consortium or joint venture may, based on the percentage of the contract value managed or executed by their HDI-members, be entitled to preference points in respect of an HDI.

A person awarded a contract as a result of preference for contracting with, or providing equity ownership to an HDI, may not subcontract more than 25% of the value of the contract to a person who is not an HDI or does not qualify for the same number or more preference for equity ownership.

### **BID DECLARATION**

Bidders must complete the "Declaration of Interest" form at the end of this form.

## DECLARATION OF INTEREST

1. No bid will be accepted from persons in the service of the State\* .
  
2. Any person, having a kinship with persons in the service of the State, including a blood relationship, may make an offer or offers in terms of this invitation to bid. In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons connected with or related to persons in the service of the State, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority and/or take an oath declaring his/her interest bid.
  
3. In order to give effect to the above, the following questionnaire must be completed and submitted with the bid: -
  - 3.1 Full name .....
  
  - 3.2 Identity number .....
  
  - 3.3 Company registration number .....
  
  - 3.4 Tax reference number.....
  
  - 3.5 VAT registration number .....
  
  - 3.6 Are you presently in the service of the State\* YES  / NO 
    - 3.6.1 If so, furnish particulars .....
  
    - .....
  
  - 3.7 Have you been in the service of the State for the past 12 months YES  / NO 
    - 3.7.1 If so, furnish particulars .....
  
    - .....
  
  - 3.8 Do you have any relationship (family, friend, other) with persons YES  / NO   
in the service of the State and who may be involved with the evaluation  
and/or adjudication of this bid?
    - 3.8.1 If so, furnish particulars .....
  
    - .....
  
  - 3.9 Are you aware of any relationship (family, friend, other) between YES  / NO   
a bidder and any persons in the service of the State and who may be  
involved with the evaluation and/or adjudication of this bid?
    - 3.9.1 If so, furnish particulars .....
  
    - .....

3.10 Are any of the company's directors, managers, principle shareholders or stakeholders in service of the State? YES  / NO

3.10.1 If so, furnish particulars .....

.....

3.11 Are any spouse, child or parent of the company's directors, managers, principle shareholders or stakeholders in service of the State? YES  / NO

3.11.1 If so, furnish particulars .....

.....

\* 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.

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## C E R T I F I C A T I O N

I, THE UNDERSIGNED (NAME) .....

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

Date

.....

Position

Name of bidder

## DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

- 1 This Municipal Quotation Document must form part of all quotes 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 Any quote may be rejected if the supplier, or any of it's directors have: -
  - a. abused the municipality's/municipal entity's supply chain management system or committed any improper conduct in relation to such system;
  - b. been convicted for fraud or corruption during the past five years;
  - c. willfully neglected, reneged on or failed to comply with any government, municipal or other public sector contract during the past five years; or
  - d. been listed in the Register for Bid Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004).
- 4 In order to give effect to the above, the following questionnaire must be completed and submitted with the quote: -

Item	Question	Yes	No
4.1	Is the bidder or any of its directors listed on the National Treasury's database as a company or person prohibited from doing business with the public sector?  <b>(Companies or persons who are listed on this database were informed in writing of this restriction by the National Treasury after the <i>audi alteram partem</i> rule was applied).</b>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.1.1	If so, furnish particulars:		
4.2	Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)? <b>access this Register enter the National Treasury's website, <a href="http://www.treasury.gov.za">www.treasury.gov.za</a>, click on the icon "Register for Tender Defaulters" or submit your written request for a hard copy of the Register to facsimile number (012) 3265445).</b>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.2.1	If so, furnish particulars:		
4.3	Was the bidder or any of its directors convicted by a court of law (including a court of law outside the Republic of South Africa) for fraud or corruption during the past five years?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.3.1	If so, furnish particulars:		

Item	Question	Yes	No
4.4	Does the bidder or any of its directors owe any municipal rates and taxes or municipal charges to the municipality / municipal entity, or to any other municipality / municipal entity, that is in arrears for more than three months?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.4.1	If so, furnish particulars:		
4.5	Was any contract between the bidder and the municipality / municipal entity or any other organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.7.1	If so, furnish particulars:		

**CERTIFICATION**

***I, THE UNDERSIGNED (FULL NAME) .....  
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

.....  
Date

.....  
Position

.....  
Name of Bidder