



# SOL PLAATJE MUNICIPALITY

## *INVITATION FOR QUOTATION*

*Q025/2011*

### *SUPPLY AND DELIVERY OF BULK METERS AND MODEMS*

SUPPLIER \_\_\_\_\_

ADDRESS: \_\_\_\_\_ TEL NO: \_\_\_\_\_

\_\_\_\_\_ CELL NO.: \_\_\_\_\_

\_\_\_\_\_ FAX NO: \_\_\_\_\_

Prepared for:-

Sol Plaatje Municipality  
Private Bag X5030  
KIMBERLEY  
8300

Prepared by: -

**LINE MANAGER: DINEO MOOKETSI**  
Private Bag x5030  
KIMBERLEY  
8300

**SOL PLAATJE MUNICIPALITY**

**INVITATION FOR QUOTATIONS**

Directorate: **INFRASTRUCTURE & SERVICES** Section: **TEST AND METERING**

Contact person: **DINEO MOOKETSI** telephone: **0538306417**

*Documents are obtainable from:  
Contract Department, City Hall, 2 Market Square, Kimberley  
Telephone: 053 8078482/3/9*

Date: **25 February 2011**

Reference No. **"Q 025/2011"**

**Q 025/2011:**

**SUPPLY AND DELIVER BULK METERS AND MODEMS**

***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)***

***GENERAL CONDITIONS***

***Quotations must be submitted using this official quotation form.***

- (1) ***PRICES ALTERED BY MEANS OF CORRECTION FLUID WILL NOT BE CONSIDERED***
- (2) All quotations must be submitted with a completed Preference point system procurement certificate.
- (3) Prices quoted must include value added tax, delivery charges **and offloading 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. **(Refer to listing Criteria Form, SQD 6.**

**SQD1**

- (7) Quotations submitted by registered providers will only be considered if a copy of proof of registrations 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: **“Q 025 /2011: Supply and Deliver Bulk Meters and Modems”** 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 TUESDAY, 8 MARCH 2011.**  
***Quotations will be opened in public in the Boardroom of the City Hall immediately after closing the same day.***
- (10) 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 \_\_\_\_\_

## SQD3.2

### PRICE SCHEDULE AND SPECIFICATIONS

Suppliers are to adhere strictly to the specifications given.

Not adhering to the specifications, will result in the quotation not being considered.

#### **SPECIAL CONDITIONS:**

#### **ELECTRICAL REQUIREMENTS:**

The meter may be installed in various electrical networks and shall cater for all types of configurations namely:

- Three phase three wire installations: All three phase voltages available but only current supply from two phases available.
- Three phase four wire installations: All three phase voltages and current supply from three phases available.
- The meter shall provide the complete solution for complex time of use metering for commercial and industrial consumers and should be available as CT or CTVT operated meter and Direct Connected meter.
- The meters shall be able to measure import active and leading and lagging reactive energy. It shall be possible to display at least total kWh, total kvarh (lagging), total kvarh (leading) and more electrical quantities.
- The meter shall have a two pushbuttons one to scroll at the quantities measured and one to reset.
- The meter shall detect voltage imbalance and have more than three levels of security passwords which can be enabled or disabled if required.

#### **AUXILLARY SUPPLY:**

The device shall operate phase voltages, be it directly from the phase or through a VT.

Any batteries used shall have a minimum life of ten years under normal operating conditions and shall have a backup capacity of at least three years in the absence of auxiliary power.

#### **CURRENT AND VOLTAGE INPUTS:**

The standard reference frequency is  $50\text{Hz} \pm 5\%$ .

The voltage range shall be from 57.5V to 240V (3phase 4 wire) and 100V to 415V (3phase 3 wire) current range from 1A to 10A CT operated and Direct connection 10A to 100A.

The meter shall operate correctly with a maximum voltage input of at least 110% of the standard reference of the meter.

#### **METER BURDEN:**

The burden of each voltage circuit at reference voltage, reference temperature and reference frequency shall not exceed 2W and 10VA.

The burden of each current circuit at reference voltage, reference temperature and reference frequency shall not exceed 1 VA.

#### **DISPLAY:**

The resolution of the display shall ensure that the values on the display do not saturate and scroll over for at least a three month period.

The values displayed shall consist of at least seven significant digits and have a back light.

It shall be possible to display the previous energy and historical register contents on the local display.

The meter shall support the display of various engineering data either through the local meter display and through a software interface connected to the meter.

This is required to assess during installation if all the inputs are identified by the meter and can act as a verification tool for correct installation. The following is required as a minimum:

1. Voltage per phase
2. Current per phase
3. Angle between voltage and current per phase
4. Power factor.

**REAL TIME CLOCK:**

It shall have a real time clock that will not drift by more than 60 seconds in a 30 day period. This clock may be synchronized to line frequency or a crystal oscillator circuit. The crystal shall be within accuracy limits for the total temperature range specification of the meter.

A facility shall exist to synchronise the clock using an external source through local or remote interrogation. When the time on the meter is being corrected it shall be possible to do so without resetting any other parameters in the meter. The synchronization shall be indicated in the load profile if the period is longer or shorter to facilitate consumption validation.

During any loss of supply the time of the clock shall be maintained by e.g., a crystal oscillator circuit and a back-up battery.

**INTERFACE PORTS:**

The meter shall have an optical port for local meter reading and configuration that will conform to IEC 62056 part 21. The meter shall have a serial port (such as RS232 OR RS 485) that will be used for communication and through a modem to a remote system. It must be possible to cascade at least eight meter through communication port without the use of additional external hardware. The meter shall make provision for a cell-phone modem to be installed under the meter’s cover to minimize external connections and to save space.

**LOAD PROFILE MASS MEMORY:**

**Minimum requirements for meter are:**

Intergration period	1 channels load profile	Instrumentation profile
30 min	400 days	300 days
15 min	100 days	100 days
5 min	30 days	15 days
1 min	7 days	7 days

These channels shall be user configurable via local or remote communication depending on the needs of the installation.

Allows up to 90 days of 30 minute profile data to be collected in less than 30 seconds.

The integration period shall be user configurable and programmable to cater for time intervals of 60 minutes, 30 minutes, 15 minutes, 10 minutes, 5 minutes and 1 minute.

The following non-interval data shall also be stored on the meter and it shall be able to retrieve this data through remote communication and through PC or Hand Held unit:

Instantaneous instrumentation values

Total energy (active and reactive)

Status alarm to verify the integrity of the data.

All configuration parameters.

All data should be date and time stamped at the meter.

**ACCURACY CLASS:**

The accuracy class on meters for active energy will be at least class 0.5, in accordance with IEC 62053 part 21 and part 22 and class 2 for reactive energy, in accordance with IEC 62053 part 23.

**COMMUNICATION:**

DLMS/COSEM is the protocols that have been standardized by IEC.

DLMS/COSEM is thus the preferred protocols for use with programmable meters.

**CALIBRATION:**

All meters shall be delivered calibrated at a SANAS accredited facility, and the meter supplier/calibration facility shall apply a “TESTED” sticker to the meter before delivery.

**TYPE TESTING REQUIREMENTS:**

The manufacturer or supplier shall only tender with meters that have been type tested according to the requirements as specified by IEC 62052 part 11 and IEC 62053 part 21, 22 and 23. These type tests shall only be

accepted if they were done at an accredited test facility. The supplier of the meters shall obtain SABS approval certificates (RCC certification) to indicate that SABS approve of the type testing in cases where the type testing was done at an international facility.

***A copy of all test certificates and details of tests performed and the SABS approval certificates shall be submitted with the tender, , failure to do so the bidder will not be evaluated and will be set aside.***

#### **MECHANICAL REQUIREMENTS:**

The meter shall be in accordance with IEC 62052 part 11, IEC 62053 part 21, 22 and 23.

The design and construction of the meter shall minimize the risk of short-circuiting of the insulation between live parts and accessible conducting parts due to accidental loosening or unscrewing of wiring or components.

The meter shall withstand solar radiation without impairing its function. The appearance of the equipment and in particular the legibility of the markings shall not be altered by prolonged exposure to solar radiation.

#### **CASE:**

The case shall be in accordance with the IEC 62052 part 11, IEC 62053 part 21, 22 and 23 and the terminals arrangement shall be in accordance with BS 5685.

The housing shall be for surface mounting.

All wiring to and from the meter shall go through the terminal block.

Terminal blocks shall be positioned at the base of the meter.

There shall be two securing screws on each terminal for the fastening of current and voltage inputs.

Auxiliary inputs and outputs may either be spring clamp terminals or screw type terminals with one securing screw.

The terminal shall have a bore diameter of at least 4mm.

Terminals identification shall be clearly identified on the meter and through a wiring diagram situated on the meter.

Any internal circuit carrying current from the current terminals of the meter shall be multistrands, with a rating of at least 3A/mm squared. Specifically, no circuits that carry current from instrumentation current transformers under normal operating conditions shall be routed by way of a printed circuit board.

All terminal covers shall be in accordance with IEC 62052 part 11, IEC 62053 part 21, 22 and 23 and the following:

- 1) The terminal cover shall enclose the actual terminals, the conductor fixing screws and a suitable length of the external conductors and their insulation and modem.
- 2) When the meter is installed, no access to the terminals shall be possible without breaking a mechanical seal on the cover.

#### **SOFTWARE:**

The meter shall be supplied with configuration software.

All software supplied with the meter to configure and interrogate the meter shall be supplied at no extra costs.

The software shall be documented comprehensively with all the features and functions discussed, including a set of examples as to how the meters can be configured for different tariff structures and applications.

The suppliers of the meter and software shall also on request of the user supply a configuration scheme to configure the meter that will satisfy the requirements of verification projects.

Training shall be provided for all relevant staff by the supplier of the meter training shall cover the installation, maintenance, and operation of the system and the configuration software ***AT NO EXTRA COST.***

#### **REMOTE DOWNLOAD REQUIREMENTS:**

The meter's software will also be used to interrogate and configure the meters remotely.

The software shall be able to retrieve the load profile data.

Date and time shall be synchronized remotely. When date and time is changed then it shall be recorded as an event in the meter's register.

It shall be able to change the demand intervals length remotely.

It shall be able to change the load profile channel allocations remotely.

Retrieve instantaneous operating parameters (voltage, current, angle between voltages and current etc)

Provision shall be made in the configuration software to export the raw data into an Excel spread sheet or similar package.

The supplier of the meter shall state the duration of a dial out sequence to retrieve two channels of data over 30 minute intervals for a period of 30 days.

## TECHNICAL SPECIFICATION FOR MODEM

GSM/GPRS modem with four digital inputs and future proof meter reading solution.

Must be an industrialized GSMmodem with a standard AT-command set and a built-in 110VAC/220VAC (selectable) power supply. In addition, it shall have four digital inputs that will report alarms via SMS and fit inside the meter. The inputs may be programmed to report alarms via SMS on high or low events. Different target numbers may be specified for different types of alarms. It shall interface to any industrial application with a RS232 serial port that needs to get data to a central point with flexible data cable options allowing you to specify your interface. Must be reliable and robust with a lifespan of more than ten years.

It shall have LED indicators on all the communications lines allowing us to know the state of the modem.

An additional power LED and a GSMstatus LED completes all the visual indication you may need.

Must have a number of resetting features that ensure the meter is almost always reachable:

24hr Reset

Resets every 24hrs (but not if it is in a data call).

Long data call reset

If a data call stays unterminated for longer than a preset time, will force the call to terminate.

CommAlive

Detects that network registration has been lost for longer than 10 minutes, it will force a re-register.

GPRS

To ensure that routing information is not lost, the will de-attach from-, and re-attach to the GPRS network on a regular basis. It shall be small sized to make it ideal for retro fitment into existing installations.

### THEFT AND VANDALISM

Some installations are in high-risk areas where vandalism and theft pose a major cost and operations headache. The cost of the antenna being replaced is often dwarfed by the cost of sending someone there. On top of this, the meter data will be inaccessible until the antenna is replaced. It shall be made of 2mmhigh-impact polycarbonate potted for extra strength. The built-in ground plane should allow it to be mounted on metallic surfaces.

The specifications are:

Frequency: 900MHz

Type: Quarter wave whip

Gain: 2dBi

VSWR: Less than 1.8.

UV Stabilized: Yes

Connector: Gold-plated SMA and other signal

### GSM specifications

Dual Band EGSM/GPRS (EGSM900/1800).

ETSI GSM Phase 2+ compliant

Class 4 (2W@MHz).

Class 1 (1W@1800 MHz).

Data asynchronous transparent/nontransparent up to 14400 kpb/s.

Fax group 3 (Class 1 and 2).

GPRS Class 2 or Class 10 (optional).

Coding Schemes CS1 to CS4.

### Included in the Package

Modem with 110VAC/220VAC main power supply

Mains power cable kit.

Data Cable with DB25 female.

Wall mounting bracket (optional).

Magnetic mounting dual band GSM antenna or Vandal resistant GSMantenna.

License to use software with the device.

### Free Software Tools

The bundles with a free license to use a software package designed to assist the installer with configuring and testing the modems. During installations, the software helps the installer determine the best position for optimal signal strengths. A commissioning tool creates a pdf file with all the information for use as proof of a quality installation.

## Interfaces

Data: RS232 (DB25 Female as standard)

GSM: SMAFemale

Inputs: Potential free contacts with common

Mains: Screw Terminals (Live/Neutral/Earth)

DC: Optional DC cable for battery backup.

## Fault Alarms at Your Fingertips

The four digital inputs may be connected to potential free contacts . These inputs must be configured to send SMSs to a number of different cell phones thereby ensuring that someone will know there is an alarm condition. By programming the meters to activate their outputs for certain conditions such as phase failure, the user has the ability to program the system for almost any alarm condition. A number of different mounting options are available to suit the customer's requirements. This mounting option allows the installer to clip the device into the second communications slot. Modems must be the mains powered communications devices to fit inside the meter.

### Wall Mounting

This option allows the installer to mount the device with a single mounting screw against a wall or panel bulkhead.

	<b>Description</b>	<b>Quantity</b>	<b>Price per meter</b>	<b>Total price Inclusive of vat and delivery</b>
1.	<i>SUPPLY AND DELIVER BULK METERS AND MODEMS</i>	40 Bulk meters and modems		
	<b>NETT TOTAL AMOUNT, R</b>			

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

### **AS AGREED BY : -**

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

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

### **APPROVED BY:**

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

# DECLARATION OF INTEREST SQD 4

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 in the service of the State and who may be involved with the evaluation and/or adjudication of this bid? YES  / NO 
    - 3.8.1 If so, furnish particulars .....
    - .....
  - 3.9 Are you aware of any relationship (family, friend, other) between 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? YES  / NO 
    - 3.9.1 If so, furnish particulars .....
    - .....

**SQD 4**

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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**CERTIFICATION**

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

.....

<p><b>Sol Plaatje Municipality</b></p> 	<p><b>SOL PLAATJE MUNICIPALITY, KIMBERLEY</b></p> <p><b>LISTING CRITERIA</b></p>
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- 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:.....% ..... % wned 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?

**SQD 6.2**

**SOL PLAATJE MUNICIPALITY**



**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 DATABASE: \_\_\_\_\_

**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.
- 2.1.1.1 **“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.
- 2.2 **“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
- 2.6.1 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.

## SQD 6.2

### GENERAL DEFINITIONS ( Continued)

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 Disabled 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 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).
- 2 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