



<b>BID DOCUMENT</b>
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<b>BID NO. AW2023/24/03</b>
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<b>BID DESCRIPTION</b>
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<b>ESTABLISHMENT OF A PANEL OF LEGAL FIRMS FOR AMATOLA WATER FOR A PERIOD OF THREE (3) YEARS</b>
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<b>CLOSING DATE</b>
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<b>THURSDAY, 02<sup>nd</sup> NOVEMBER 2023 AT 11H00 AM</b>
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**NO EMAILED SUBMISSION WILL BE ACCEPTED**

<b>BIDDER TO COMPLETE</b>
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<b>COMPANY NAME</b>	
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<b>CSD NUMBER</b>	
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ISSUED AND PREPARED BY: AMATOLA WATER  
PRIVATE BAG X3  
VINCENT  
5217  
Tel: +27 43 707 3700

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**SECTION A**  
**TENDERING INVITATION, PROCEDURE,**  
**SPECIFICATION AND PRICING**

**PART A  
INVITATION TO BID**

**YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF AMATOLA WATER-AMANZI**

BID NUMBER:	AW2023/24/03	CLOSING DATE:	02 NOVEMBER 2023	CLOSING TIME:	11:00 am
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**DESCRIPTION** **ESTABLISHMENT OF A PANEL OF LEGAL FIRMS FOR AMATOLA WATER FOR A PERIOD OF THREE (3) YEARS**

**BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)**

**Reception area of Amatola House**

**6 Lancaster Road**

**Vincent**

**East London**

**BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO**

**TECHNICAL ENQUIRIES MAY BE DIRECTED TO:**

CONTACT PERSON	<b>Namhla Ndlamla</b>	CONTACT PERSON	<b>Adv. Z. Mazula</b>
TELEPHONE NUMBER	<b>043 707 3700</b>	TELEPHONE NUMBER	<b>043 709 3700</b>
FACSIMILE NUMBER	<b>n/a</b>	FACSIMILE NUMBER	<b>n/a</b>
E-MAIL ADDRESS	<a href="mailto:ndlamla@amatolawater.co.za">ndlamla@amatolawater.co.za</a>	E-MAIL ADDRESS	<a href="mailto:zmazula@amatolawater.co.za">zmazula@amatolawater.co.za</a>

**SUPPLIER INFORMATION**

NAME OF BIDDER			
POSTAL ADDRESS			
STREET ADDRESS			
TELEPHONE NUMBER	CODE	NUMBER	
CELLPHONE NUMBER			
FACSIMILE NUMBER	CODE	NUMBER	
E-MAIL ADDRESS			
VAT REGISTRATION NUMBER			
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:	OR	CENTRAL SUPPLIER DATABASE No: MAAA
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]

**QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS**

IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? ☐ YES ☐ NO

DOES THE ENTITY HAVE A BRANCH IN THE RSA? ☐ YES ☐ NO

DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA? ☐ YES ☐ NO

DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA? ☐ YES ☐ NO

IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? ☐ YES ☐ NO

**IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.**

## TERMS AND CONDITIONS FOR BIDDING

### 1. BID SUBMISSION:

- 1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
- 1.2. **ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED (NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.**
- 1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
- 1.4. **THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).**

### 2. TAX COMPLIANCE REQUIREMENTS

- 2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
- 2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
- 2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
- 2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
- 2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
- 2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
- 2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

### 3. TOTAL BID PRICE:

ITEM	REQUIRED GOODS & SERVICES	TOTAL RATES INCL VAT (Amount in figures) R	TOTAL RATES INCL. VAT (Amount in words) R
	<b>ESTABLISHMENT OF A PANEL OF LEGAL FIRMS FOR AMATOLA WATER FOR A PERIOD OF THREE (3) YEARS</b>		..... .....  <b>(Carried from SBD3.1)</b>

**NB: FAILURE TO PROVIDE ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.**

SIGNATURE OF BIDDER: .....

CAPACITY UNDER WHICH THIS BID IS SIGNED: .....  
(Proof of authority must be submitted e.g. company resolution)

DATE: .....

## TENDER NOTICE AND INVITATION TO TENDER

**BID NO: AW2023/24/03**

### **ESTABLISHMENT OF A PANEL OF LEGAL FIRMS FOR AMATOLA WATER FOR A PERIOD OF THREE (3) YEARS**

Amatola Water Board is a state-owned, South African water utility established in November 1997 and is mandated to render water services to water sector institutions, to local government and other customers in the Eastern Cape.

### **INVITATION AND SCOPE OF WORK**

Suitably experienced and qualified service providers are invited to respond to this bid invitation for the

<b>Bid Number</b>	<b>Bid Name</b>	<b>Scope of Work</b>	<b>Bid Closing Date and Time</b>
<b>AW2023/24/03</b>	<b>ESTABLISHMENT OF A PANEL OF LEGAL FIRMS FOR AMATOLA WATER FOR A PERIOD OF THREE (3) YEARS</b>	Provision of legal services	<b>02<sup>nd</sup> November 2023 at 11:00 am</b>

### **BID PUBLICATION**

An open competitive bidding process is to be followed. A bid invitation will be published in the regional newspaper, Amatola Water website and National Treasury Website(e-tender).

Tender documents shall be downloaded for free from the Amatola Website ([www.amatolawater.co.za](http://www.amatolawater.co.za)) on **Thursday 12<sup>th</sup> October 2023 at 09:00am.**

### **COMPULSORY BID CLARIFICATION MEETING**

No compulsory clarification meeting for this bid.

### **EVALUATION CRITERIA**

This bid will be evaluated in three (3) stages:

**Stage One:** Mandatory Requirements

**Stage Two:** Capability Requirements

**Stage Three:** Price and Preference

### **PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT (PPPFA) POINTS WILL BE AWARDED AS FOLLOWS:**

Maximum points on price	-	<b>80 points</b>
Maximum points on Specific Goals	-	<b>20 points</b>
<b>TOTAL</b>	-	<b>100 points</b>

**BIDDERS SHALL TAKE NOTE OF THE FOLLOWING BID CONDITIONS:**

- The Preferential Procurement Policy Framework Act 2000 (PPPFA) principles shall apply, whereby submissions will be evaluated according to the provisions of the Act.
- Amatola Water does not bind itself to accept the lowest or any tender and reserves the right to accept any tender or portion of a tender.
- Tenderers which are late, with incomplete, unsigned bids or submitted electronically will not be accepted.
- All tenders are to remain valid for a period of 90 days from the closing date of the submission.

**BID SUBMISSION**

The original completed bid documents and all supporting documents (in a separate file), must be submitted in a sealed envelope or parcel endorsed with the Bid Number and Bid Description as detailed in the Tender Data. The sealed envelope must be deposited in the Bid/Tender Box located in the reception area of **Amatola House, 6 Lancaster Rd, Vincent, East London**, prior to the time and date indicated in the bid notice and the Tender Data. The bid submissions will be opened in public shortly after the closing time.

**BID ENQUIRIES**

No telephonic enquiries relating to this tender will be entertained. All enquiries regarding this tender must be in writing only and must be directed to: Ms. N. Ndlamla - E-mail: [nndlamla@amatolawater.co.za](mailto:nndlamla@amatolawater.co.za) and for technical enquiries to Adv. Z. Mazula – Email: [zmazula@amatolawater.co.za](mailto:zmazula@amatolawater.co.za).

**Mr Siyabulela Koyo**

**Acting Chief Executive Officer**

*Amatola Water supports transformation through Preferential Procurement and tenders will be awarded in accordance with Amatola Water's Supply Chain Management Policy.*

## **SPECIAL TENDER CONDITIONS**

### **1. DEFINITIONS**

The word "Bidder/Tenderer" in these conditions shall mean and include any firm of Contractors, Suppliers, Service Providers or any company or body incorporated or unincorporated.

### **1. BID SUBMISSION**

The original completed bid documents must be submitted in a sealed envelope endorsed with the Bid Number and Bid Description as detailed in the Tender Data. The sealed envelope must be deposited in the Bid/Tender Box, located in the reception area of **Amatola Water, 6 Lancaster Road, Vincent, East London**, not later than the time and date specified on the cover page and SBD 1 of this bid document.

### **2. PERIOD OF VALIDITY FOR BIDS AND WITHDRAWAL OF BID AFTER CLOSING DATE**

All Bids must remain valid for a period of 90 (ninety) days from the closing date as stipulated in the Bid document.

### **3. FORM A - AUTHORITY TO SIGN BID DOCUMENTS**

In the case of a Bid being submitted on behalf of a company, close corporation, or partnership, the evidence must be submitted to Amatola Water at the time of submission of the Bid that the Bid has been signed by persons properly authorised thereto by resolution of the Board of Directors.

**Form A must be completed. Failure to complete Form A will invalidate your bid.**

### **4. LATE BIDS**

Bids received after the closing date and time, at the address indicated in the bid documents, will not be accepted for consideration and where practicable, be returned unopened to the Bidder(s).

### **5. JOINT VENTURE REQUIREMENTS**

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

Should a group of companies/firms and/or interested parties wish to enter into a joint venture / consortium agreement the following minimum requirements must be met: -

- a. A properly signed copy of the joint venture/consortium agreement must be attached.
- b. Each member of the joint venture/consortium's taxes must be in order.
- c. After the award of a contract to a joint venture/consortium, the successful joint venture group or consortium must provide a combined joint venture/consortium Tax Clearance Certificate.
- d. After the award of a contract to a joint venture/consortium, the successful joint venture group or consortium must provide the details of the joint venture / consortium banking details.
- e. A trust, consortium or joint venture will qualify for points of their Specific Goals as a legal entity, provided that the entity claims points from the SBD 6.1 points form and submit CSD's for both companies.



## **THE JOINT VENTURE/CONSORTIUM AGREEMENT MUST CONTAIN THE FOLLOWING: -**

- a. Who the managing member will be.
- b. Who the signatory of authority will be.
- c. How the joint venture/consortium share of profit will be split.
- d. The bank account details where payments will be deposited into.
- e. The agreement must be signed by all parties.
- f. The agreement must be certified by a Commissioner of Oaths.
- g. The postal and physical address where all correspondence will be sent to

## **6. OBLIGATIONS OF THE SERVICE PROVIDER:**

The successful Service provider shall:

- a) Abide by the Service Level Agreement concluded and act as a partner to Amatola Water.
- b) Provide all relevant information necessary to the achievement of the above.
- c) Respond within a reasonable time to decisions that need to be made, and support required and any other matters that may need resolving in order not to delay the operations of Amatola Water.

## **7. CONDITIONS OF TENDER/POST AWARD NEGOTIATION**

- a) Submission of this proposal signifies the applicant's acceptance of the conditions as laid down in this document, unless clearly stated otherwise.
- b) Any expense incurred by the applicant in preparing and submitting this proposal will be for the applicant's account.
- c) Amatola Water reserves the right not to accept any proposal and cancel the bid as and when the need arises.
- d) No provision in a contract shall be deemed to prohibit the sourcing of services from other service providers should there be delays from the service provider in the contract.
- e) Amatola Water reserves the right not to award, to award in part or in full.
- f) The right is also reserved to withdraw or amend any of the bid conditions by notice in writing to all bidders prior to the closing date of the bid.
- g) The service provider must report to Amatola Water, should they encounter conditions beyond their reasonable control, which impact the timely delivery of the goods/services. The supplier should notify Amatola Water immediately having become aware of these conditions.
- h) In the event an incorrect award has been made, Amatola Water reserves the right to remedy the matter in any manner it may deem fit.
- i) Amatola Water reserves the right to negotiate offers or rates in alignment with the tariffs as regulated under Government Gazette NO. R 2133, 03 June 2020 as may be amended (Rules Board of Courts of Law Act, 1985 No. 107 of 1985)
- j) Alterations or additions to the bid document are not allowed except to comply with instructions issued by Amatola Water, or necessary to correct an error/s made by the bidders. Bidders shall initial or sign in such alterations. **(NB: Failure to comply with this requirement will result in the submitted proposal being disqualified).**

## **8. PRICE ADJUSTMENT**

Price increase will be based on Consumer Price Index (CPI) and supported by documentary proof justifying the price increase application as published in the Statistics South Africa Reports. The price increases are to be negotiated with Amatola Water prior to implementation.

## **BID SPECIFICATION**

### **ESTABLISHMENT OF A PANEL OF LEGAL FIRMS FOR AMATOLA WATER FOR A PERIOD OF THREE (3) YEARS**

#### **1. BACKGROUND AND INTRODUCTION**

Amatola Water (AW) is a state-owned water utility established in November 1997 and is mandated to render water services to water sector institutions, local government, and other customers in the Eastern Cape.

The purpose of this bid is to outline the requirements specification for the appointment of a suitably qualified and experienced legal firms to submit proposals to serve in the Panel for provision of Legal Services to Amatola Water for a period of three (3) years.

Bid Number	Bid Description
AW2023/24/03	<b>ESTABLISHMENT OF A PANEL OF LEGAL FIRMS FOR AMATOLA WATER FOR A PERIOD OF THREE (3) YEARS</b>

#### **2. SCOPE OF WORKS**

##### **2.1 The scope of this tender includes the following:**

The unexpected and/or technical nature of the legal matter requires that access to the necessary legal services are readily available. As a result, a need exists to establish a panel of suitably qualified legal firms to deliver certain legal services on demand, based on tendered rates for a period of three (3) years in the following areas of law:

- Administrative / Public Law / Procurement Law
- Labour Law
- Commercial Law / Corporate Law
- Property Law
- Contract / Engineering / Construction Law
- Debts and Claims Management
- Regulatory Compliance
- Intellectual Property Law
- Information and Communication Technology Law
- Cyber Law and Information Security
- Environmental Law

The appointment of a bidder in this manner will ensure that suitably qualified and experienced legal professionals are appointed to undertake legal work as and when needed (in other words “on a demand basis”).

**2.2** Bidders will be appointed to the Panel of Legal Firms in the categories listed below:

CATEGORY	FIELDS OF APPOINTMENT	INDICATE WHICH CATEGORY BIDDING FOR (X)
Category One	Administrative / Public Law / Procurement Law	
Category Two	Labour Law	
Category Three	Commercial Law / Corporate Law	
Category Four	Property Law	
Category Five	Engineering / Construction Law	
Category Six	Debts and Claims Management	
Category Seven	Regulatory Compliance	
Category Eight	Intellectual Property Law	
Category Nine	Information and Communication Technology Law	
Category Ten	Cyber Law and Information Security	
Category Eleven	Environmental Law	

**2.3** The services required by Amatola Water from successful bidder(s) in respect of each area of specialisation contained in each category are as follows:

### **2.3.1 Category One – Administrative / Public Law / Procurement Law**

#### **2.3.1.1 Administrative / Public Law**

- a. Advise on the Public Finance Management Act and or Intergovernmental Relations Framework Act and/or other related legislation.
- b. Advice on Public Procurement best practices and / or Supply Chain Management legislative framework and Act / Legislative frameworks and action / guidelines including National Treasury Circulars and Broad Based Black Empowerment Act.
- c. Draft, negotiate and/or review agreements between organs of state
- d. Defend any matters that may arise as a result of administrative decisions taken by the entity e.g. procurement awards that may be challenged.
- e. Provide litigation and dispute resolutions services in areas of Administrative and Procurement law; and
- f. General advisory services on matters relating to the public sector.

### **2.3.1.2 Legislative Drafting**

- a. Provide opinions.
- b. Draft and comment on national legislation affecting Amatola Water Board

### **2.3.1.3 Constitutional Law**

- a. Advise on the constitutionality of legislation, policies etc; and
- b. Provide litigation services in areas of constitutional law

## **2.3.2 Category Two – Labour / Employment Law**

### **2.3.2.1 Labour Law**

- a. Advise on dispute that arise out of the employment relationship
- b. Draft and vet contracts of employment policies and procedures
- c. Appear on behalf of Amatola Water in employment related forums such as the CCMA, Labour Court etc.
- d. Provide litigation services in areas of labour law; and
- e. General and strategic labour law advise and services

## **2.3.3 Category Three – Commercial / Corporate Law**

### **2.3.3.1 Contract Law**

- a) Provide advise / opinion on contractual issues;
- b) Provide litigation services in all areas of contract law; and
- c) Draft and vet contracts as and when required.

### **2.3.3.2 Commercial Law**

- a) Provide advice on commercial law matters; and
- b) Provide litigation services in areas of commercial law

### **2.3.3.3 Corporate Governance**

- a) Advise on all aspects of corporate governance and
- b) Provide litigation services in areas of corporate governance.

## **2.3.4 Category Four – Property Law**

- a) Provide advice on property related matters;
- b) Draft and negotiate lease and ownership agreements; and
- c) Provide litigation services in property related matters.

## **2.3.5 Category Five – Engineering / Construction Law**

- a) Provide litigation service in these areas.
- b) Services required are listed below but not limited to.
- c) Advice on standard form contracts (e.g. FIDIC, NEC, GC, JBCC, ECC etc.), recommended for use by the Construction Industry Development Board, the Built Environment professions, the Construction Regulations 2003, and the Built Environment Professional Legislations and other applicable laws.;  
Advice on regulatory framework;
- d) Advice on contract insurances;
- e) Provide litigation and dispute resolution services in all areas of Construction Law; and
- f) Advice on all aspects of Construction Law and related matters.
- g) Disputes on contractual matters e.g. insurance requirements exposure to specific projects, standard form of contract management e.g. advice on all aspects of claim procedures as well as claim preparation and enforcement (or defence) strategies, assessment and formulation of delay and disruptions claims;
- h) And any relevant items
- i) Training
- j) Monthly reporting on the current status of all matters

#### **2.3.6 Category Six – Debts and Claims Management**

- a) Advise on debt management and debt claims.
- b) Provide litigation services in areas debt and claims management.
- c) Assist in making payment arrangements
- d) Assist in debt recovery and debt collection processes

#### **2.3.7 Category Seven – Regulatory Compliance**

- a) Assist in the development or review of the regulatory compliance register taking into account all the legislation/ regulations relevant to Amatola Water (AW).
- b) Research and update the entity on any new legislation/ regulation relevant to AW.
- c) Assess the entity's compliance with applicable laws and regulations.
- d) Conduct Compliance Awareness Training.

#### **2.3.8 Category Eight – Intellectual Property Law**

- a) Advise on intellectual property matters including trademarks, copyright, designs etc; and
- b) Provide litigation services in areas of intellectual property law.
- c) Provide litigation services in areas of commercial law.

**2.3.9 Category Nine: Information and Communication Technology Law**  
**(Information Technology Law)**

- a) Advise on all legal and governance issues arising from the development, procurement and use of information technology.
- b) Provide litigation services in areas of information technology law; and
- c) Draft and negotiate information technology agreements as required.
- d) Provide advice on the hosting of data outside the country or outside the GDPR region

**2.3.10 Category Ten: Cyber Law and Information Security**

- a) Advise on the protection of AW hosted in cloud platforms
- b) Provide litigation services in the event of contravention of POPIA or other Acts

**2.3.11 Category Eleven: Environmental Law**

- a) Advise on matters pertaining to Water Law and Environmental Law.
- b) Provide litigation services in areas of water and environmental law.

**3. SPECIFIC REQUIREMENTS**

- 3.1 The appointed Panel of Legal Firms will be issued with a letter of instruction based on as and when required basis for the provision of legal services to Amatola Water.
- 3.2 The services amongst the appointed legal firms will be allocated on a rotational basis according to highest points scored and in accordance with the specific required area of law.
- 3.3 Detailed Skill Transfer Plan indicating how a prospective service provider intends transferring skills to the Legal Service team.
- 3.4 Amatola Water reserves the right to appoint a legal firm for any legal services which are not covered in the categories listed above.
- 3.5 **Attorney:** To be in “Good Standing” with the South African Legal Practice Council, as per the Rules, means that:

- The attorney has been enrolled as an attorney under the Legal Practice Act 28 of 2014, in that the name of the attorney appears on the Roll of legal practitioners and has not been suspended from practice;
- There are no proceedings pending or contemplated to remove the attorney from the roll of legal practitioners or to be suspended from practice;
- That where the attorney is required to be in possession of a Fidelity Fund certificate, that he/she is in possession of a valid Fidelity Fund Certificate; and
- That the legal practitioner is up to date with all amounts owed by him or her to the Council.

3.6 **Conveyancer:** Is a practising attorney who is admitted and enrolled to practise as a Conveyancer under the

Legal Practice Act 28 of 2014

3.7 **Notary:** Is a practising attorney who is admitted and enrolled to practise as a notary under the  
Legal  
28 of 2014.

## **BID CRITERIA FOR EVALUATION**

Bidders must submit all required documents indicated hereunder with the bid documents at the closing date and time of the bid. During this evaluation stage, bidder's responses will be evaluated based on the documents submitted under mandatory requirements. The bid documents must be completed in all respects in non-erasable ink **(No tippex or correctional fluid or paper pastes must be used)**.

Bids must be submitted on original bid documents. Bid documents must remain intact and no portion may be detached. **Any bid that does not meet these requirements will be disqualified and will be considered as non-responsive.**

The received bid proposals will be evaluated in three stages to arrive to the final stage of bid award, and the stages will be as follows:

### **STAGE 1 – MANDATORY REQUIREMENTS**

In this stage, all bids received will be verified for compliance and completeness of the submitted proposal per the below set of requirements. Bidders who fail to comply with the below requirements will be eliminated and bidders who comply with the below progresses to the next stage.

The following declaration forms must be completed and signed in full:

- SBD 1: Invitation to Bid
- SBD 3.1: Pricing Schedule - Total Price offer/rates must be transferred to SBD 1
- SBD 4: Bidder's disclosure:

**NB: Bidder must ensure that 2.3 of SBD 4 is dully completed in all aspects including all or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract.**

- FORM A: AUTHORITY TO SIGN: In the case of a Bid being submitted on behalf of a company, close corporation, or partnership, the evidence must be submitted to Amatola Water at the time of submission of the Bid that the Bid has been signed by persons properly authorised thereto by resolution of the Board of Directors.
- FORM B: schedule of previous similar contracts satisfactorily completed.

- In the case of joint ventures, an official business agreement must be submitted in the bid proposal.

All forms and declarations must be signed and completed and returned with the Bid Document as a whole.

Failure to sign and/or complete the forms and declarations will result in the bid being disqualified.

**NB: The bidder must initial or sign next to any alterations or corrections made.**

### **STAGE 2 – CAPABILITY REQUIREMENTS**

All compliant proposal shall be evaluated for their capability requirement for the required service. A capability compliance verification shall be undertaken to establish the minimum capacity



requirements to undertake the services. The capability verification in respect of each of the criteria are given hereunder.

Tenders not complying will be considered as non-responsive.

No.	Evaluation Criteria	Details	Compliant / Non-compliant	Documentary Proof to be attached during bid submission
1	Company Experience: Previous similar contracts	Company must provide full details of similar successfully completed projects in Government Institutions (National, Provincial, Local Government and Public Entities/State Owned Entities) and Private Entities within the last five years'		1. Completed, signed, and stamped B1, B2 and B3.  <b>NB: Reference letters will not be accepted.</b>
2	Bidder Certification / Affiliation requirements	Legal Firm must provide confirmation of registration with Legal Practice Council (LPC)  Legal Firm must be up to date with the Attorneys Fidelity Fund.		<b>Proof of registration with the LPC which includes:</b>  <b>Original letter of Good Standing from the LPC.</b>  Fidelity Fund Certificate (Certified copy of valid Fidelity Fund Certificate)
		Attorneys must be registered with the Legal Practice Council (LPC).  In addition, the individual Directors/ Partner/ attorney/s to attend to Amatola Water matters must provide a certified copy of a valid Fidelity Fund Certificate.  Attorney – Conveyancing & Notarial Practice.		<b>Proof of registration with LPC:</b>  <b>Original letter of Good Standing together with a valid (up to date)</b>  <b>Attorneys valid copy of Fidelity Fund certificate.</b>  <b>Valid documentation (Certified ID Copies of the Partners or Directors or Lead Attorneys)</b>  Conveyancing & Notarial Practice Certificate

3.	Lead Director	The Lead Director must be an Admitted Attorney with a minimum 5 years' experience as a Lead Director.	<b>Proof of registration with LPC:</b>  <b>Original letter of Good Standing together with a valid (up to date)</b>  Certified Copies of Qualifications and Detailed CV of the Lead Director
4	Organogram (Complete Structure)	The Legal Team should consist of at least following:  Director / Associate(s) Senior Practitioner(s) Junior Legal Practitioner(s) Senior Practitioner(s) Candidate Attorneys  For Senior Practitioner(s), Junior Legal Practitioner(s) at least three (3) years minimum.  For Senior Practitioner(s), Junior Legal Practitioner(s) at least six (6) months minimum.  <b>NB: The details can be the same as the Lead Director</b>	<b>Proof of registration with LPC:</b>  <b>Original letter of Good Standing together with a valid (up to date)</b>  Certified Copies of Qualifications and Detailed CV.

**NB: Certified copies of document should not be older than 6 months.**

### STAGE 3 – PRICE AND PREFERENCE 80/20

In terms of the Preferential Procurement Policy Framework Act (PPPFA) the 80/20 scoring system will be applicable to this tender.

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
<b>Total points for Price and SPECIFIC GOALS</b>	<b>100</b>

### **PRICE EVALUATION (80)**

The price points out of 80 will be allocated to the Price Tendered or evaluated price.

Adjudication Criteria	Points
Price Evaluation $Ps = 80 \left( 1 - \frac{Pt - P_{min}}{P_{min}} \right)$	80

Where:

- Ps*** = Points scored for price of Bid under consideration  
***Pt*** = Rand value of Bid under consideration  
***Pmin*** = Rand value of lowest acceptable Bid

### **SPECIFIC GOALS (20)**

Specific goals for the tender and points claimed are indicated per the table below.

***Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)***

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system) (To be completed by the organ of state)
HDI (51% or more black ownership)	5
Black women (51% or more women ownership)	4
Black youth (51% or more youth ownership)	3
People with disability (20% or more disabled people ownership)	2
Locality (Enterprise within the Eastern Cape)	6

- **SBD 6.1 must be fully completed and signed by the bidders in order to claim the above points, failure to claim points will result in non-awarding of points.**

## **SECTION B: RETURNABLE DOCUMENTS**

**The following documents must be completed in full and submitted with this bid:**

SBD 1: Invitation to Bid

FORM A: Authority to Sign

FORM B : SCHEDULE OF PREVIOUS SIMILAR CONTRACTS SATISFACTORILY CARRIED OUT BY THE TENDERER

FORM B1 must be completed, signed and stamped.

FORM B2 must be completed, signed and stamped.

FORM B3 must be completed, signed and stamped.

SBD 4: Bidder's Disclosure

SBD 3.1: Pricing Schedule: Firm prices

SBD 3.2: Pricing Adjustments: Non- firm prices (IF APPLICABLE)

**The following documents must be submitted with this bid:**

- CSD and Tax Verification PIN
- SBD 6.1 must be completed and signed in order to claim points for specific goals. Failure will lead in non-awarding of points for specific goals
- JOINT VENTURE AGREEMENT (IF APPLICABLE)

## **FORM A: AUTHORITY TO SIGN DOCUMENTS**

The person listed below are duly authorised/ delegated to sign all documents in connection with the tender offer and any contract resulting from it on our behalf by virtue of the Articles of Association/Resolution of the Board of Directors. All fields to be completed.

### **Details of authorised/ delegated person**

**NAME**

**SIGNATURE**

**DATE**

### **WITNESSES:**

1.

**NAME**

**SIGNATURE**

**DATE**

2.

**NAME**

**SIGNATURE**

**DATE**

**FORM B: Schedule of previous related contracts satisfactorily carried out by the tenderer.**

Service Providers should very briefly describe their experience in this regard by completing the schedule below by providing details of at **least three (3) comparable contracts** within the last 5 (Five) years relating to the **ESTABLISHMENT OF A PANEL OF LEGAL FIRMS FOR AMATOLA WATER FOR A PERIOD OF THREE (3) YEARS** to corporate clients or public entities. All the required information requested below should be provided and a **general listing of contracts completed will not suffice**.

Comparable supply contracts of the entity within the last 5 years	Short Description	Contract Value (incl. VAT)	Dates (Commencement; Completion)	Client and contactable reference (include phone no.)

**SIGNED ON BEHALF OF TENDERER:** .....

## FORM B.1: CONFIRMATION OF REFERENCES TO AMATOLA WATER

NAME OF BIDDING COMPANY:	
PREVIOUS CLIENT/EMPLOYER NAME:	
TENDER/BID NUMBER OF COMPLETED CONTRACT/PROJECT	
DESCRIPTION OF CONTRACT/ PROJECT PREVIOUSLY COMPLETED	
VALUE OF WORK COMPLETED	
DURATION AND DATE COMPLETED:	

The above-mentioned Bidding Company is in the process of submitting a Bid for **AW2023/24/03: ESTABLISHMENT OF A PANEL OF LEGAL FIRMS FOR AMATOLA WATER FOR A PERIOD OF THREE (3) YEARS** for Amatola Water. If your company had prior exposure with the Bidding Company, as part of the evaluation process for this bid, Amatola Water requires your company to confirm goods/services supplied by the above Bidding Company as per below questionnaire.

1. Were the goods/ services supplied according to the required quality as per the description/specification and were delivered on time?	Select applicable rating <input type="checkbox"/> <b>Excellent,</b> <input type="checkbox"/> <b>Good,</b> <input type="checkbox"/> <b>Satisfactory,</b> <input type="checkbox"/> <b>Poor</b>
2. Kindly, indicate their overall performance on the project.	Select applicable rating <input type="checkbox"/> <b>Excellent,</b> <input type="checkbox"/> <b>Good,</b> <input type="checkbox"/> <b>Satisfactory,</b> <input type="checkbox"/> <b>Poor</b>

Full Name of Authorised Signatory .....

Contact Number ..... Email address.....

Signature..... Date.....

### \*CLIENT (EMPLOYER) STAMP HERE

**\*Incomplete and/or unsigned form will not be accepted and Amatola Water reserves the right to contact any Client Company listed as a reference. Hand-written imprints on the stamp area will not be accepted. No reference letters will be accepted.**

## FORM B.2: CONFIRMATION OF REFERENCES TO AMATOLA WATER

NAME OF BIDDING COMPANY:	
PREVIOUS CLIENT/EMPLOYER NAME:	
TENDER/BID NUMBER OF COMPLETED CONTRACT/PROJECT	
DESCRIPTION OF CONTRACT/ PROJECT PREVIOUSLY COMPLETED	
VALUE OF WORK COMPLETED	
DURATION AND DATE COMPLETED:	

The above-mentioned Bidding Company is in the process of submitting a Bid for **AW2023/24/03: ESTABLISHMENT OF A PANEL OF LEGAL FIRMS FOR AMATOLA WATER FOR A PERIOD OF THREE (3) YEARS** for Amatola Water. If your company had prior exposure with the Bidding Company, as part of the evaluation process for this bid, Amatola Water requires your company to confirm goods/services supplied by the above Bidding Company as per below questionnaire.

<p>3. Were the goods/ services supplied according to the required quality as per the description/specification and were delivered on time?</p>	<p>Select applicable rating</p> <p><input type="checkbox"/> <b>Excellent,</b></p> <p><input type="checkbox"/> <b>Good,</b></p> <p><input type="checkbox"/> <b>Satisfactory,</b></p> <p><input type="checkbox"/> <b>Poor</b></p>
<p>4. Kindly, indicate their overall performance on the project.</p>	<p>Select applicable rating</p> <p><input type="checkbox"/> <b>Excellent,</b></p> <p><input type="checkbox"/> <b>Good,</b></p> <p><input type="checkbox"/> <b>Satisfactory,</b></p> <p><input type="checkbox"/> <b>Poor</b></p>

Full Name of Authorised Signatory .....

Contact Number ..... Email address.....

Signature..... Date.....

### \*CLIENT (EMPLOYER) STAMP HERE

\*Incomplete and/or unsigned form will not be accepted and Amatola Water reserves the right to contact any Client Company listed as a reference. Hand-written imprints on the stamp area will not be accepted. **No reference letters will be accepted.**



## FORM B.3: CONFIRMATION OF REFERENCES TO AMATOLA WATER

NAME OF BIDDING COMPANY:	
PREVIOUS CLIENT/EMPLOYER NAME:	
TENDER/BID NUMBER OF COMPLETED CONTRACT/PROJECT	
DESCRIPTION OF CONTRACT/ PROJECT PREVIOUSLY COMPLETED	
VALUE OF WORK COMPLETED	
DURATION AND DATE COMPLETED:	

The above-mentioned Bidding Company is in the process of submitting a Bid for **AW2023/24/03: ESTABLISHMENT OF A PANEL OF LEGAL FIRMS FOR AMATOLA WATER FOR A PERIOD OF THREE (3) YEARS** for Amatola Water. If your company had prior exposure with the Bidding Company, as part of the evaluation process for this bid, Amatola Water requires your company to confirm goods/services supplied by the above Bidding Company as per below questionnaire.

5. Were the goods/ services supplied according to the required quality as per the description/specification and were delivered on time?	Select applicable rating <input type="checkbox"/> <b>Excellent,</b> <input type="checkbox"/> <b>Good,</b> <input type="checkbox"/> <b>Satisfactory,</b> <input type="checkbox"/> <b>Poor</b>
6. Kindly, indicate their overall performance on the project.	Select applicable rating <input type="checkbox"/> <b>Excellent,</b> <input type="checkbox"/> <b>Good,</b> <input type="checkbox"/> <b>Satisfactory,</b> <input type="checkbox"/> <b>Poor</b>

Full Name of Authorised Signatory .....

Contact Number ..... Email address.....

Signature..... Date.....

### \*CLIENT (EMPLOYER) STAMP HERE

**\*Incomplete and/or unsigned form will not be accepted and Amatola Water reserves the right to contact any Client Company listed as a reference. Hand-written imprints on the stamp area will not be accepted. No reference letters will be accepted.**

## BIDDER'S DISCLOSURE

### 1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

### 2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest<sup>1</sup> in the enterprise, employed by the state? **YES/NO**

2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of State institution

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

2.2.1 If so, furnish particulars:

.....  
 .....

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<sup>1</sup> the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

2.3.1 If so, furnish particulars:

.....  
 .....

### **3 DECLARATION**

I, the undersigned, (name)..... in submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium<sup>2</sup> will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not
- 3.7 exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

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<sup>2</sup> Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....  
Signature Date

.....  
Position Name of bidder

## PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

**NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022**

### 1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

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

1.2 **To be completed by the organ of state**

- a) The applicable preference point system for this tender is the 80/20 preference point system.
- b) The lowest acceptable tender will be used to determine the accurate system once tenders are received.

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price; and
- (b) Specific Goals.

1.4 **To be completed by the organ of state:**

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
<b>Total points for Price and SPECIFIC GOALS</b>	<b>100</b>

1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

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

## 17. DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

## 3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

### 3.1. POINTS AWARDED FOR PRICE

#### 3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

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

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

Where

Ps = Points scored for price of tender under consideration  
Pt = Price of tender under consideration  
Pmin = Price of lowest acceptable tender

## 3.2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

### 3.2.1. POINTS AWARDED FOR PRICE

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

$$\begin{array}{ccc} \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\ \hline Ps = 80 \left( 1 + \frac{Pt - P_{max}}{P_{max}} \right) & \text{or} & Ps = 90 \left( 1 + \frac{Pt - P_{max}}{P_{max}} \right) \end{array}$$

Where

Ps = Points scored for price of tender under consideration  
Pt = Price of tender under consideration

Pmax = Price of highest acceptable tender

#### 4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
  - (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,
- then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

**Table 1: Specific goals for the tender and points claimed are indicated per the table below.**  
*(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.)*  
**Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)**

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
HDI (51% or more black ownership)	5	
Black women (51% or more women ownership)	4	
Black youth (51% or more youth ownership)	3	
People with disability (20% or more disabled people ownership)	2	
Locality (Enterprise within the Eastern Cape)	6	

#### DECLARATION WITH REGARD TO COMPANY/FIRM

- 4.3. Name of company/firm.....
- 4.4. Company registration number: .....
- 4.5. TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One-person business/sole propriety
- ☐ Close corporation
- ☐ Public Company
- ☐ Personal Liability Company
- ☐ (Pty) Limited
- ☐ Non-Profit Company
- ☐ State Owned Company

**[TICK APPLICABLE BOX]**

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of the contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
  - (a) disqualify the person from the tendering process;
  - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
  - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
  - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
  - (e) forward the matter for criminal prosecution, if deemed necessary.'

-----  
**SIGNATURE(S) OF TENDERER(S)**

**SURNAME AND NAME:** .....

**DATE:** .....

**ADDRESS:** .....

.....  
 .....



## **SECTION C:**

# **PRICING INSTRUCTIONS, PRICING SCHEDULE AND CONTRACT**

### **PRICE INSTRUCTIONS AND ESCALATION**

The following pricing schedules must be completed in full:

SBD 3.1: Pricing Schedule: Firm prices

SBD 3.2: Pricing Schedule: Non- firm prices (Not Applicable)

NB: If there are any unconditional discount offers, kindly attach a schedule that will indicate where those discounts are applied from.

Failure to fully complete the pricing instructions will invalidate your bid. All line items should be completed.

### **PRICE ADJUSTMENT**

Price increase will be based on CPI and supported by documentary proof justifying the price increase application as published in the Statistics South Africa Reports. The price increases are to be negotiated with Amatola Water prior to implementation.

All orders placed will be based on the current Bid prices. It is the responsibility of the Bidder to inform Amatola Water of any escalation prior to the implementation of the escalated price. Failure to do so will negate any such claims.

### **VALUE ADDED TAX**

In calculating the cost of the supply and delivery of services and / or material, the supplier will issue a "Tax Invoice" for all services rendered and / or materials supplied, which will reflect the exclusive cost of such services, goods or materials with the relevant Value Added Tax being added to the total.

VAT must be included in the Bid price but must be shown separately.

Non-VAT vendors must not include VAT in their bid price.

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

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

**IN CASES WHERE DIFFERENT DELIVERY POINTS INFLUENCE THE PRICING, A SEPARATE PRICING SCHEDULE MUST BE SUBMITTED FOR EACH DELIVERY POINT**

Name of Bidder.....Bid number **AW2023/24/03**

Closing Time .....Closing date: **02 November 2023**

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

	ITEM DESCRIPTION	Rate per hr (R)
	<b><u>CONSULTATIONS, APPEARANCES AND INSPECTIONS:</u></b>	
1	1. Consultation with a client and witnesses to institute or defend an action for advice on evidence or advice on commission for obtaining an opinion or an advocate's guidance in preparing pleadings in preparing pleadings, including exceptions and to draft a petition or affidavit per hour: a) By an Attorney b) By a Candidate Attorney	a) R b) R
2	Attendance by attorney in court at proceeding in terms of Rule 37 per hour	R
3	Attendance by a Candidate attorney where necessary to assist at a contested proceedings per hour	R
4	Inclusive fee for necessary consultation and discussions with a client, witness, other party or advocate not otherwise provided per hour – a) By an attorney b) By a candidate attorney	R
5	Appearance by an attorney in court or the performance by an Attorney of any other functions of an advocate in terms of the Right of Appearance in Court Acts, 1995 (Act No 62 of 1995). The tariff under Rule 69 shall apply.	R
	<b><u>DRAFTING AND DRAWINGS</u></b>	
6.	1. The Drawing up of other necessary documents including:  a) Instruction for an option for Advocate's guidance in preparing pleadings including further particulars and requests for same including exceptions,  b) Instructions to advocate in respect of all classes of pleadings	a) R b) R

	<p>c) A petition, exceptions or affidavit any notice (except a formal notice) particulars of claim or an annexure to the summons opinion by an attorney or any other important document not otherwise provided for, an inclusive tariff drawing up, checking, typing, copies, delivery and filing thereof per page of the original only.</p> <p>2. Letters, telegrams and facsimiles: inclusive tariff for drawing up checking, typing, printing, delivery, copies, postage, posting thereof per page.</p>	<p>c) R</p> <p>2 R</p>
7.	<p><b><u>ATTENDANCE AND PERUSAL</u></b></p> <p>Attending the receipt, entry, perusing, considering and filing of any summons, petition, affidavit, pleading, advocate's advice and drafts, report, important letter, notice or document.</p>	R
8.	<p><b><u>MISCELLANEOUS</u></b></p> <p>1. For taking necessary copies, including photocopies of any document or papers not already provided in this tariff per A4 size page.</p> <p>2. Necessary telephone calls: The actual cost thereof –</p> <p>a) By an attorney</p> <p>b) By a candidate attorney</p> <p>3. Sending facsimile / email letters: The actual cost of sending the facsimile / email letter, in addition to the fee allowed for the drawing thereof.</p>	<p>1. R</p> <p>2. a) R</p> <p>2. b) R</p> <p>3 R</p>
9.	<p><b><u>REVIEW OF PAGES OF DOCUMENTATION</u></b></p> <p>Rate per Page</p>	R
	<b><u>TOTAL OF RATES</u></b>	R
	<b>Transfer the total rates to SBD 1.</b>	

**\*\*ALL APPLICABLE TAXES INCLUDES VALUE ADDED TAX, PAY AS YOU EARN INCOME TAX, UNEMPLOYMENT INSURANCE FUND CONTRIBUTIONS AND SKILLS DEVELOPMENT LEVIES\*\***

Other legal costs and miscellaneous costs	The appointed firms of Legal Practitioners should charge tariffs which are not higher than tariffs regulated in Government Gazette (NO. R858. 7 August 2020 as may be amended)
Conveyancing and Notarial Fees	The appointed firms of Legal Practitioners should charge tariff which are not higher than approved fees contained in the schedules as made by the Deeds Registries Regulation Board and Conveyancing Fees Guidelines.

Required by:

Amatola Water

-At..... Head Office .....

- Brand and model.....N/A.....

- Country of origin .....N/A.....
- Does the offer comply with the specification(s)? .....\*YES/NO
- If not to specification, indicate deviation(s) .....
- Period required for delivery .....
- Delivery: .....\*Firm/not firm

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

NOTE: PRICE ADJUSTMENTS WILL BE ALLOWED AT THE PERIODS AND TIMES SPECIFIED IN THE BIDDING DOCUMENTS.

**IN CASES WHERE DIFFERENT DELIVERY POINTS INFLUENCE THE PRICING, A SEPARATE PRICING SCHEDULE MUST BE SUBMITTED FOR EACH DELIVERY POINT**

Name of Bidder.....Bid number: .....

Closing Time **11:00** ..... Closing date: .....

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

- Does the offer comply with the specification(s)? \*YES/NO
- If not to specification, indicate deviation(s) .....
- Period required for delivery .....
- Delivery: \*Firm/not firm

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

### A NON-FIRM PRICES SUBJECT TO ESCALATION

1. IN CASES OF PERIOD CONTRACTS, NON FIRM PRICES WILL BE ADJUSTED (LOADED) WITH THE ASSESSED CONTRACT PRICE ADJUSTMENTS IMPLICIT IN NON FIRM PRICES WHEN CALCULATING THE COMPARATIVE PRICES

IN THIS CATEGORY PRICE ESCALATIONS WILL ONLY BE CONSIDERED IN TERMS OF THE FOLLOWING FORMULA:

$$Pa = (1 - V)Pt \left( D1 \frac{R1t}{R1o} + D2 \frac{R2t}{R2o} + D3 \frac{R3t}{R3o} + D4 \frac{R4t}{R4o} \right) + VPt$$

Where:

- Pa = The new escalated price to be calculated.  
 (1-V) Pt = 85% of the original bid price. **Note that Pt must always be the original bid price and not an escalated price.**  
 D1, D2.. = Each factor of the bid price eg. labour, transport, clothing, footwear, etc. The total of the various factors D1, D2...etc. must add up to 100%.  
 R1t, R2t..... = Index figure obtained from new index (depends on the number of factors used).  
 R1o, R2o = Index figure at time of bidding.  
 VPt = 15% of the original bid price. This portion of the bid price remains firm i.e. it is not subject to any price escalations.

3. The following index/indices must be used to calculate your bid price:

Index..... Dated.....      Index..... Dated.....      Index..... Dated.....  
 Index..... Dated.....      Index..... Dated.....      Index..... Dated.....

2. FURNISH A BREAKDOWN OF YOUR PRICE IN TERMS OF ABOVE-MENTIONED FORMULA. THE TOTAL OF THE VARIOUS FACTORS MUST ADD UP TO 100%.

FACTOR (D1, D2 etc. e.g. Labour, transport etc.)	PERCENTAGE OF BID PRICE

### PRICES SUBJECT TO RATE OF EXCHANGE VARIATIONS

1. Please furnish full particulars of your financial institution, state the currencies used in the conversion of the prices of the items to South African currency, which portion of the price is subject to rate of exchange variations and the amounts remitted abroad.

PARTICULARS OF FINANCIAL INSTITUTION	ITEM NO	PRICE	CURRENCY	RATE	PORTION OF PRICE SUBJECT TO ROE	AMOUNT IN FOREIGN CURRENCY REMITTED ABROAD
				ZAR=		
				ZAR=		
				ZAR=		
				ZAR=		
				ZAR=		
				ZAR=		

2. Adjustments for rate of exchange variations during the contract period will be calculated by using the average monthly exchange rates as issued by your commercial bank for the periods indicated hereunder: (Proof from bank required)

AVERAGE MONTHLY EXCHANGE RATES FOR THE PERIOD:	DATE DOCUMENTATION MUST BE SUBMITTED TO THIS OFFICE	DATE FROM WHICH NEW CALCULATED PRICES WILL BECOME EFFECTIVE	DATE UNTIL WHICH NEW CALCULATED PRICE WILL BE EFFECTIVE

## CONTRACT FORM - RENDERING OF SERVICES

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

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

1. I hereby undertake to render services described in the attached bidding documents to (name of the institution)..... in accordance with the requirements and task directives / proposals specifications stipulated in Bid Number **AW2023/24/03** at the price/s quoted. My offer/s remain binding upon me and open for acceptance by the Purchaser during the validity period indicated and calculated from the closing date of the bid .
2. The following documents shall be deemed to form and be read and construed as part of this agreement:
  - (i) Bidding documents, viz
    - Invitation to bid;
    - Proof of tax compliance status;
    - Pricing schedule(s);
    - Filled in task directive/proposal;
    - Preference claim form for Preferential Procurement in terms of the Preferential Procurement Regulations;
    - Bidder's Disclosure form;
    - Special Conditions of Contract;
  - (ii) General Conditions of Contract; and
  - (iii) Other (specify)
3. I confirm that I have satisfied myself as to the correctness and validity of my bid; that the price(s) and rate(s) quoted cover all the services specified in the bidding documents; that the price(s) and rate(s) cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.
4. I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this agreement as the principal liable for the due fulfillment of this contract.
5. I declare that I have no participation in any collusive practices with any bidder or any other person regarding this or any other bid.
6. I confirm that I am duly authorised to sign this contract.

NAME (PRINT) .....

CAPACITY .....

SIGNATURE .....

NAME OF FIRM .....

DATE .....

#### WITNESSES

1 .....

.....

2 .....



**CONTRACT FORM - RENDERING OF SERVICES****PART 2 (TO BE FILLED IN BY AMATOLA WATER)**

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

<b><i>DESCRIPTION OF SERVICE</i></b>	<b>PRICE (ALL APPLICABLE TAXES INCLUDED)</b>	<b>COMPLETION DATE</b>	<b>TOTAL PREFERENCE POINTS CLAIMED</b>	<b>POINTS CLAIMED FOR EACH SPECIFIC GOAL</b>

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

SIGNED AT .....ON.....

NAME (PRINT) .....

SIGNATURE .....

OFFICIAL STAMP

WITNESSES

1 .....  
....

2 .....

## **GENERAL CONDITIONS OF CONTRACT**

The General Conditions of Contract (GCC) of July 2010, for Government Procurement as published by National Treasury will be applicable to this contract.

The potential service provider must enter into a formal Service Level Agreement (SLA) with Amatola Water.