PART A: INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE STELLENBOSCH MUNICIPALITY					
FQ NUMBER:	**113/24**	CLOSING DATE:	**02 April 2024**	CLOSING TIME:	**14:00**
DESCRIPTION	**PROVISION OF PROFESSIONAL SERVICES FOR THE DEVELOPMENT OF AN INVESTMENT PROSPECTUS AND MARKETING CAMPAIGN STRATEGY FOR THE STELLENBOSCH (WC024) MUNICIPALITY**				
Complusory site Meeting to be held on Monday 25 March 2024 @12:00am at NPK Building, 2nd Floor- Planning Department Boardroom. Stellenbosch					
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT *(STREET ADDRESS)* **Stellenbosch Municipality, Town Hall Complex, Plein Street, Stellenbosch.**					

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				
TAX COMPLIANCE STATUS	TCS PIN:		**OR** CSD No:	
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE OR ORIGINAL SWORN AFFIDAVIT [TICK APPLICABLE BOX]	☐ Yes ☐ No		CONTRIBUTOR FACTOR (1 – 20)	
LOCALITY [TICK APPLICABLE BOX]	☐ Yes ☐ No			

[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]

***ARE YOU THE ACCREDITED REPRESENTATIVE** IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?*	☐Yes ☐No [IF YES ENCLOSE PROOF]	***ARE YOU A FOREIGN BASED SUPPLIER FOR** THE GOODS /SERVICES /WORKS OFFERED?*	☐Yes ☐No [IF YES, ANSWER PART B:3]
CRS no	*TOTAL BID PRICE (Brought forward from MBD 3.1)*		**R**
SIGNATURE OF BIDDER	.....	*DATE*	
CAPACITY UNDER WHICH THIS BID IS SIGNED			

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO:		**TECHNICAL INFORMATION MAY BE DIRECTED TO:**	
DEPARTMENT	FINANCE – SCM	DEPARTMENT	**Planning Department**
CONTACT PERSON	Bulelwa Dolomba	CONTACT PERSON	**Joh'ne Jansen**
TELEPHONE NUMBER	021 808 8521	TELEPHONE NUMBER	**021 808 8144**
E-MAIL ADDRESS	Bulelwa.dolomba@stellenbosch.gov.za	E-MAIL ADDRESS	**Joh-ne.jansen@stellenbosch.gov.za**

PART B: 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 ONLINE**

1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022, THE STELLENBOSCH SUPPLY CHAIN MANAGEMENT POLICY, THE STELLENBOSCH PREFERENTIAL PROCUREMENT POLICY,THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT

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 VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.

2.3 APPLICATION FOR THE TAX COMPLIANCE STATUS (TCS) CERTIFICATE OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE WWW.SARS.GOV.ZA.

2.4 FOREIGN SUPPLIERS MUST COMPLETE THE PRE-AWARD QUESTIONNAIRE IN PART B:3.

2.5 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.

2.6 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.

2.7 WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.

3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS

3.1.	IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?	☐ YES ☐ NO
3.2.	DOES THE ENTITY HAVE A BRANCH IN THE RSA?	☐ YES ☐ NO
3.3.	DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?	☐ YES ☐ NO
3.4.	DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?	☐ YES ☐ NO
3.5.	IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?	☐ YES ☐ NO

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

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

NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE.

THE MUNICIPALITY RESERVES THE RIGHT TO ACCEPT ALL, SOME, OR NONE OF THE BIDS SUBMITTED EITHER WHOLLY OR IN PART — AND IT IS NOT OBLIGATED TO ACCEPT THE LOWEST BID.

SIGNATURE OF BIDDER: .....

CAPACITY UNDER WHICH THIS BID IS SIGNED: .....

DATE: .....

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PART B: TECHNICAL SPECIFICATIONS, PRICING SCHEDULE AND CHECKLIST

10. Technical specifications
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YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF STELLENBOSCH MUNICIPALITY

REQUEST FOR FORMAL QUOTATION NUMBER: 113/24

REQUEST QUOTATION DESCRIPTION: PROVISION OF PROFESSIONAL SERVICES FOR THE DEVELOPMENT OF AN INVESTMENT PROSPECTUS AND MARKETING CAMPAIGN STRATEGY FOR THE STELLENBOSCH (WC024) MUNICIPALITY

Complusory site Meeting to be held on Monday 25 March 2024 @12:00am at NPK Building, 2nd Floor- Planning Department Boardroom. Stellenbosch

CLOSING DATE: 02 April 2024

TIME: 14:00

Bid documents can be obtained from the Supply Chain Management Unit, 1ST floor, Plein Street , Stellenbosch 08h00 and 15:00. A non-refundable fee of R50-00 is payable to Stellenbosch Municipality. Alternatively, the bid documents can be downloaded from our website at www.stellenbosch.gov.za by following the Supply Chain Management link.

Enquiries can be directed as follows:

Type of enquiry	Contact person	Tel no	Email address
Bidding procedures and documents	Bulelwa Dolomba	021 808 8521	bulelwa.dolomba@stellenbosch.gov.za
Technical enquiries	Joh'ne Jansen	021 808 8144	Joh-ne.jansen@stellenbosch.gov.za

Bids may only be submitted on the bid documentation provided by the municipality and must remain valid for 60 days after bid closing.

Bids must be submitted in a sealed envelope. The quotation number and quotation description must appear on the outside of the envelope. Bidders that fail to adhere to this requirement will be disqualified at the bid opening.

Bids must be deposited in the **bid box**, located at the entrance of the Municipal Offices of Stellenbosch Municipality, Ground floor, Plein Street , Stellenbosch, by no later than the date and time as specified above. This quotation box is open 24/7. Telephonic, telex, facsimile, e-mail and late bids will not be accepted.

Bids will be opened in public in the Supply Chain Management Conference room at the 1st Floor , Room 101B, Plein Street , Stellenbosch. The lowest, only or any bid shall not necessarily be accepted and the municipality reserves the right to accept any part of the bid or to withdraw the invitation to bid.

This bid shall be evaluated on the 80/20 preference points system in terms of the Stellenbosch Preferential Procurement Policy effective from 16 January 2023 in accordance with the Preferential Procurement Regulations that was promulgated by the Minister of Finance on 04 November 2022 in Government Gazette No 47452

Prospective bidders must familiarise themselves with the content of Stellenbosch Municipality's Supply Chain Management Policy and must be registered on the **Central Supplier Database (CSD)** if they wish to conduct business with the municipality. The General Conditions of Contract is applicable.

GM METTLER
STELLENBOSCH MUNICIPALITY

AUTHORITY TO SIGN A BID

SOLE PROPRIETOR (SINGLE OWNER BUSINESS) AND NATURAL PERSON

I, _____, the undersigned, hereby confirm that I am the sole owner of the business trading as _____.

OR

I, _____, the undersigned, hereby confirm that I am submitting this tender in my capacity as natural person.

SIGNATURE:		DATE:	
PRINT NAME:			
WITNESS 1:		WITNESS 2:	

COMPANIES AND CLOSE CORPORATIONS

If a Bidder is a COMPANY, a certified copy of the resolution by the board of directors, duly signed, authorising the person who signs this bid to do so, as well as to sign any contract resulting from this bid and any other documents and correspondence in connection with this bid and/or contract on behalf of the company must be submitted with this bid, that is, before the closing time and date of the bid

In the case of a CLOSE CORPORATION (CC) submitting a bid, a resolution by its members, authorizing a member or other official of the corporation to sign the documents on their behalf, shall be included with the bid.

PARTICULARS OF RESOLUTION BY BOARD OF DIRECTORS OF THE COMPANY/MEMBERS OF THE CC

Date Resolution was taken	
Resolution signed by (name and surname)	
Capacity	
Name and surname of delegated Authorised Signatory	
Capacity	
Specimen Signature	

Full name and surname of ALL Director(s) / Member (s)			

Is a CERTIFIED COPY of the resolution attached?	YES		NO	

SIGNED ON BEHALF OF COMPANY / CC:		DATE:	
PRINT NAME:			
WITNESS 1:		WITNESS 2:	

1. Taxes and duties

1.1. A foreign supplier shall be entirely responsible for all taxes, stamp duties, license fees, and other such levies imposed outside the purchaser's country.

1.2. A local supplier shall be entirely responsible for all taxes, duties, license fees, etc., incurred until delivery of the contracted goods to the purchaser.

1.3. No contract shall be concluded with any bidder whose tax matters are not in order. Prior to the award of a bid SARS must have certified that the tax matters of the preferred bidder are in order.

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

2. Transfer of contracts

The contractor shall not abandon, transfer, cede, assign or sublet a contract or part thereof without the written permission of the purchaser.

3. Amendment of contracts

No agreement to amend or vary a contract or order or the conditions, stipulations or provisions thereof shall be valid and of any force unless such agreement to amend or vary is entered into in writing and signed by the contracting parties. Any waiver of the requirement that the agreement to amend or vary shall be in writing, shall also be in writing.

4. Prohibition of restrictive practices.

4.1. In terms of section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, an agreement between, or concerted practice by, firms, or a decision by an association of firms, is prohibited if it is between parties in a horizontal relationship and if a bidder(s) is / are or a contractor(s) was / were involved in collusive bidding.

4.2. If a bidder(s) or contractor(s) based on reasonable grounds or evidence obtained by the purchaser has / have engaged in the restrictive practice referred to above, the purchaser may refer the matter to the Competition Commission for investigation and possible imposition of administrative penalties as contemplated in section 59 of the Competition Act No 89 0f 1998.

4.3. If a bidder(s) or contractor(s) has / have been found guilty by the Competition Commission of the restrictive practice referred to above, the purchaser may, in addition and without prejudice to any other remedy provided for, invalidate the bid(s) for such item(s) offered, and / or terminate the contract in whole or part, and / or restrict the bidder(s) or contractor(s) from conducting business with the public sector for a period not exceeding ten (10) years and / or claim damages from the bidder(s) or contractor(s) concerned.

General Conditions of Contract (revised July 2010)

GENERAL CONDITIONS

1. Sealed FQ's, with the **"FQ Number and Title"** clearly endorsed on the envelope, must be deposited in the **tender box** at the offices of the Stellenbosch Municipality, Plein Street, Stellenbosch.

2. The tender must be lodged by the Tenderer in the tender box in the Main Hall Entrance, Stellenbosch Municipal Offices, Plein Street, Stellenbosch

PLEASE NOTE:

2.1. FQ's that are deposited in the incorrect box will not be considered.

2.2. Mailed, telegraphic or faxed FQ's will not be accepted.

2.3. Documents may only be completed in non-erasable ink.

2.4. The use of correction fluid/tape is not allowed.

2.4.1. In the event of a mistake having been made, it shall be crossed out in ink and be accompanied by an initial at each and every alteration.

2.4.2. Alterations or deletions not signed by the Tenderer may render the tender invalid.

2.5. All bids must be submitted in writing on the official forms supplied (not to be re-typed)

2.6. All prices shall be quoted in South African currency and be **INCLUSIVE of VAT.**

3.1 It is a requirement of this contract that the amount of value-added tax (VAT) must be shown clearly on each invoice.

3.2 The amended Value-Added Tax Act requires that a Tax Invoice for supplies in excess of R3 000 should, in addition to the other required information, also disclose the VAT registration number of the recipient, with effect from 1 March 2005. The VAT registration number of the Stellenbosch Municipality is **4700102181.**

3 Any FQ received after the appointed time for the closing of FQ's shall not be considered but shall be filed unopened with the other FQ's received or may be returned to the Tenderer at his request.

4 FQ's may not be telefaxed to the Municipality and therefore any FQ's received by fax will **not** be considered.

5 FQ's shall be opened in public at the Stellenbosch Municipal Offices as soon as possible after the closing time for the receipt of tenders.

6 The Municipality shall have the right to summarily disqualify any Tenderer who, either at the date of submission of this tender or at the date of its award, is indebted to the Municipality in respect of any rental, levies, rates and/or service charges; ALTERNATIVELY;

6.1 That an agreement be signed whereby the Tenderer agrees that a percentage or fixed amount at the discretion of the Municipality, be deducted from payments due to him for this tender, until the debt is paid in full.

6.2 The tenderer shall declare **all** the Municipal account numbers in the Stellenbosch Area for which the enterprise or the proprietors or directors in their personal capacity is/ are responsible or co-responsible.

7 This bid will be evaluated and adjudicated according to the following criteria:

7.1 Relevant specifications
7.2 Value for money
7.3 Capability to execute the contract
7.4 PPPFA & associated regulations
7.5 Stellenbosch Municipality Preferential Procurement Policy and SCM Policy

MBD 4

DECLARATION OF INTEREST

1. No bid will be accepted from persons in the service of the state[1].

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 service of the state, it is required that the bidder or their authorised representative declare their position in relation to the evaluating/adjudicating authority.

3 In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

3.1 Full Name of bidder or his or her representative: ……..

3.2 Identity Number: ……

3.3 Position occupied in the Company (director, trustee, shareholder[2]): ……..

3.4 Company Registration Number: ……

3.5 Tax Reference Number: ……

3.6 VAT Registration Number: ……

3.7 The names of all directors / trustees / shareholders members, their individual identity numbers and state employee numbers must be indicated in paragraph 4 below.

3.8 Are you presently in the service of the state? **YES ☐ / NO ☐**

3.8.1 If yes, furnish particulars. ……

……

3.9 Have you been in the service of the state for the past twelve months? **YES ☐ / NO ☐**

3.9.1 If yes, furnish particulars _____

_____

[1]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) an executive member of the accounting authority of any national or provincial public entity; or
(f) an employee of Parliament or a provincial legislature.

[2] Shareholder" means a person who owns shares in the company and is actively involved in the management of the company or business and exercises control over the company.

3.10 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 ☐**

3.10.1 If yes, furnish particulars: ……
……

3.11 Are you, aware of any relationship (family, friend, other) between any other bidder and any persons in the service of the state who may be involved with the evaluation and or adjudication of this bid? **YES ☐ / NO ☐**

3.11.1 If yes, furnish particulars: ……
……

3.12 Are any of the company's directors, trustees, managers, principle shareholders or stakeholders in service of the state? **YES ☐ / NO ☐**

3.12.1 If yes, furnish particulars: ……
……

3.13 Are any spouse, child or parent of the company's directors, trustees, managers, principle shareholders or stakeholders in service of the state? **YES ☐ / NO ☐**

3.13.1 If yes, furnish particulars: ……
……

3.14 Do you or any of the directors, trustees, managers, principle shareholders, or stakeholders of this company have any interest in any other related companies or business whether or not they are bidding for this contract? **YES ☐/ NO ☐**

3.14.1 If yes, furnish particulars: ……
……

4. Full details of directors / trustees / members / shareholders.

Full Name	Identity Number	State Employee Number

……. ……..
Signature **Date**

……. ……
Capacity **Name of Bidder**

MBD6.1 – PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022 – PURCHASES/SERVICES 80/20

NB:
Before completing this form, bidders must study the general conditions, definitions and directives applicable in respect of B-BBEE, as prescribed in the Preferential Procurement Regulations, 2022 and the Stellenbosch Preferential Procurement Policy 2022/23

This preference form must form part of all bids invited. It contains general information and serves as a claim form for preference points for Broad-Based Black Economic Empowerment (B-BBEE) Status Level of Contribution and any other applicable preference

1. GENERAL CONDITIONS

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

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

1.2

(a) The value of this bid is estimated to not exceed R300 000 (all applicable taxes included) and therefore the 80/20 preference point system shall be applicable

1.3 Points for this bid shall be awarded for:

(b) Price;

(c) B-BBEE Status Level of Contributor. and

(d) Locality of supplier

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

	POINTS
PRICE	80
B-BBEE STATUS LEVEL OF CONTRIBUTOR	10
LOCALITY (See definitions)	10
Total points for Price and Preferences must not exceed	**100**

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

1.6 Failure on the part of a bidder to submit proof of Locality together with the bid, will be interpreted to mean that preference points for Locality are not claimed.

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

2. DEFINITIONS

(a) **"B-BBEE"** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;

(b) "**B-BBEE status level of contributor"** means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;

(c) **"bid"** means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of goods or services, through price quotations, advertised competitive bidding processes or proposals;

(d) **"Broad-Based Black Economic Empowerment Act"** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);

(e) **"EME"** means an Exempted Micro Enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;

(f) **"functionality"** means the ability of a tenderer to provide goods or services in accordance with specifications as set out in the tender documents.

(g) "**Locality**" means the local suppliers and/or service providers that business offices are within the Municipal area of Stellenbosch (WC024).

(h) **"price"** includes all applicable taxes less all unconditional discounts;

(i) **"proof of B-BBEE status level of contributor"** means:

1) B-BBEE Status level certificate issued by an authorized body or person;

2) A sworn affidavit as prescribed by the B-BBEE Codes of Good Practice;

3) Any other requirement prescribed in terms of the B-BBEE Act;

(j) **"QSE"** means a qualifying small business enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;

(k) "**Specific goals**" means specific goals as contemplated in section 2(1)(d) of the Act which may include contracting with persons, or categories of persons, historically disadvantaged by unfair discrimination on the basis of race, gender and disability including the implementation of programmes of the Reconstruction and Development Programme as published in Government Gazette No. 16085 dated 23 November 1994;

(l) **"rand value"** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

4. POINTS AWARDED FOR PRICE

4.1 THE 80/20 PREFERENCE POINT SYSTEMS

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

80/20

$$Ps = 80\left(1 - \frac{Pt - P\,min}{P\,min}\right)$$

Where

Ps = Points scored for price of bid under consideration

Pt = Price of bid under consideration

Pmin = Price of lowest acceptable bid

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

4.3 POINTS AWARDED FOR PRICE

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

80/20

$$Ps = 80\left(1 + \frac{Pt - P\,max}{P\,max}\right)$$

Where

Ps = Points scored for price of bid under consideration

Pt = Price of bid under consideration

Pmax = Price of highest acceptable bid

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

5.1 In terms of Regulation 4 (2) and 5 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining a specific goal specified for the tender

5.2 The tendering conditions will stipulate the specific goals, as contemplated in section 2(1)(d)(ii) of the Preferential Procurement Act, be attained.

5.3 A maximum of 20 points (80/20 preference points system), must be allocated for specific goals. These goals are :

(a) contracting with persons, or categories of persons, historically disadvantaged by unfair discrimination on the basis of race, gender or disability;

(b) Promotion of enterprises located in the municipal area (WCO24)

5.4 Regarding par 5.3 (a) at least 50% of the 20 points must be allocated to promote this goal and points will be allocated in terms of the BBBEE scorecard as follows.

B-BBEE Status Level of Contributor	Number of Points for 80/20 Preference Points System
1	10
2	9
3	6
4	5
5	4
6	3
7	2
8	1
Non-compliant contributor	0

5.5 A tenderer must submit proof of its BBBEE status level contributor.

5.6 A tenderer failing to submit proof of BBBEE status level of contributor –

5.6.1 may only score in terms of the 80-point formula for price; and

5.6.2 scores 0 points out of 10/5 BBBEE status level of contributor, which is in line with section 2 (1) (d) (i) of the Act, where the supplier or service provider did not provide proof thereof.

5.7 Regarding par 5.3 (b) a maximum of 50% of the 20 points must be allocated to promote this goal. Maximum points will be allocated as follows.

Locality of supplier	Number of Points for 80/20 Preference Points System
Within the boundaries of the municipality	10
Outside of the boundaries of the municipality	0

The maximum will be proportionately adjusted depending on the number of points allocated for this goal. E.G., 40% will equate to 8 points.

6. BID DECLARATION

6.1 Bidders who claim points in respect of B-BBEE Status Level of Contribution and/or Locality must complete the following:

7. B-BBEE STATUS LEVEL OF CONTRIBUTOR CLAIMED IN TERMS OF PARAGRAPHS 1.4 AND 4.1

7.1 B-BBEE Status Level of Contributor: . = ……(maximum of 10 points)

(Points claimed in respect of paragraph 7.1 must be substantiated by relevant proof of B-BBEE status level of contributor.)

7.2 Within the boundaries of Stellenbosch Municipality (WC024)?

YES		NO	

Locality of supplier: = …… (10 points)

Address - ……

……

……

(Points claimed in respect of paragraph 7.2 must be substantiated by relevant proof that the business premises is situated in the Municipal area of Stellenbosch (WC024). A valid municipal account or proof of valid lease agreement must be attached)

8. SUB-CONTRACTING

8.1 Will any portion of the contract be sub-contracted?

(***Tick applicable box***)

YES		NO	

8.1.1 If yes, indicate:

i) What percentage of the contract will be subcontracted.....……%
ii) The name of the sub-contractor……..
iii) The B-BBEE status level of the sub-contractor.....……..
iv) Whether the sub-contractor is an EME or QSE

(Tick applicable box)

YES		NO	

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

Designated Group: An EME or QSE which is at last 51% owned by:	**EME** √	**QSE** √
Black people		
Black people who are youth		
Black people who are women		
Black people with disabilities		
Black people living in rural or underdeveloped areas or townships		
Cooperative owned by black people		
Black people who are military veterans		
OR		
Any EME		
Any QSE		

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

9.1 Name of company/firm:…….

9.2 VAT registration number:……

9.3 Company registration number:……

9.4 TYPE OF COMPANY/ FIRM

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

[TICK APPLICABLE BOX]

9.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

……
……
……

9.6 COMPANY CLASSIFICATION

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

[*TICK APPLICABLE BOX*]

9.7 MUNICIPAL INFORMATION

Municipality where business is situated: ……..

Registered Account Number: ……

Stand Number:…….

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

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

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 6.1, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;

iv) If the B-BBEE status level of contributor/Locality points has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –

(a) disqualify the person from the bidding 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 bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and

(e) forward the matter for criminal prosecution.

SIGNATURE OF BIDDER(S):			
WITNESS 1:		WITNESS 2:	
DATE:			
ADDRESS:			

PLEASE COMPLETE IN FULL TO CLAIM POINTS

SWORN AFFIDAVIT – B-BBEE EXEMPTED MICRO ENTERPRISE – GENERAL (DRAFT EXAMPLE)

(DO NOT USE. USE NEW/APPLICABLE TEMPLATE)

I, the undersigned,

Full name & Surname	
Identity number	

Hereby declare under oath as follows:

1. The contents of this statement are to the best of my knowledge a true reflection of the facts.

2. I am a Member / Director / Owner (**Select one**) of the following enterprise and am duly authorised to act on its behalf: NB!

Enterprise Name:	
Trading Name (If Applicable):	
Registration Number:	
Vat Number (If applicable)	
Enterprise Physical Address:	
Type of Entity (CC, (Pty) Ltd, Sole Prop etc.):	
Nature of Business:	
Definition of "Black People"	As per the Broad-Based Black Economic Empowerment Act 53 of 2003 as Amended by Act No 46 of 2013 "Black People" is a generic term which means Africans, Coloureds and Indians – (a) who are citizens of the Republic of South Africa by birth or descent; or (b) who became citizens of the Republic of South Africa by naturalisation- i. before 27 April 1994; or ii. on or after 27 April 1994 and who would have been entitled to acquire citizenship by naturalization prior to that date;"
Definition of "Black Designated Groups"	"Black Designated Groups means: (a) unemployed black people not attending and not required by law to attend an educational institution and not awaiting admission to an educational institution; (b) Black people who are youth as defined in the National YouthCommission Act of 1996; (c) Black people who are persons with disabilities as defined inthe Code of Good Practice on employment of people with disabilities issued under the Employment Equity Act; (d) Black people living in rural and under developed areas; (e) Black military veterans who qualifies to be called a militaryveteran in terms of the Military Veterans Act 18 of 2011;"

3. I hereby declare under Oath that:

- The Enterprise is_____% Black Owned using the flow-through principle as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9 (1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013,
- The Enterprise is_____% Black Female Owned as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9 (1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013,
- The Enterprise is_____% Black Designated Group Owned as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9 (1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013,
- Black Designated Group Owned % Breakdown as per the definition stated above:

    - Black Youth % =_____%
    - Black Disabled % =_____%
    - Black Unemployed % =_____%
    - Black People living in Rural areas % =_____%
    - Black Military Veterans % =_____%

- Based on the Audited Financial Statements/Financial Statements and other information available on the latest financial year-end of_____(DD/MM/YYYY), the annua NB! Revenue was R10,000,000.00 (Ten Million Rands) or less
- Please Confirm on the below table the B-BBEE Level Contributor, **by ticking the applicable box.**

100% Black Owned	**Level One** (135% B-BBEE procurement recognitionlevel)	
At least 51% Black Owned	**Level Two** (125% B-BBEE procurement recognition level)	
Less than 51% Black Owned	**Level Four** (100% B-BBEE procurement recognition level)	

4. I know and understand the contents of this affidavit and I have no objection to take the prescribed oath and consider the oath binding on my conscience and on the Owners of the Enterprise which I represent in this matter.

5. The sworn affidavit will be valid for a period of 12 months from the date signed by commissioner.

Deponent Signature:_____

Date :_____

NB! ORIGINALLY CERTIFIED/ NOT COPY

_____

Commissioner of Oaths

Signature & stamp

Date

MBD 8

DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

1. This Municipal Bidding Document must form part of all bids invited.
2. It serves as a declaration to be used by municipalities and municipal entities in ensuring that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system.
3. The bid of any bidder may be rejected if that bidder, or any of its directors have:-
   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 Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004).

4. In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

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? (Companies or persons who are listed on this database were informed in writing of this restriction by the National Treasury after the audi alteram partem rule was applied).	**Yes**	**No**
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)? (To access this Register enter the National Treasury's website, www.treasury.gov.za, 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).	**Yes**	**No**
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**	**No**
4.3.1	If so, furnish particulars:		

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**	**No**
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**	**No**
4.5.1	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 BY THE MUNICIPALITY SHOULD THIS DECLARATION PROVE TO BE FALSE.

…… **……**
SIGNATURE **DATE**

…… **……**
POSITION **NAME OF BIDDER**

DECLARATION: CERTIFICATE FOR MUNICIPAL SERVICES AND PAYMENTS TO SERVICE PROVIDERS

PART A: PROPERTY OWNED BY ENTERPRISE OR DIRECTORS
Please complete the following if property is owned by the enterprise, the proprietors, directors or partners in their personal capacity, obtain the confirmation of the relevant municipality and attach a copy of their municipal account(s) which are not older than 90 days. (Refer MBD 4 paragraph 4)
Name of account holder: …… Account number: …… Name of account holder: …… Account number: …… Name of account holder: …… Account number: ……

PART B: PROPERTY LEASED BY ENTERPRISE OR DIRECTORS
Please attach a sworn affidavit or a copy of your lease agreement if the property is leased by the enterprise or the proprietors or directors in their personal capacity, for which the aforementioned is not responsible for payment of municipal rates and taxes.

PART C: WHERE PROPERTY IS NOT OWNED OR LEASED BY ENTERPRISE OR DIRECTORS
Please attach a sworn affidavit from the proprietor or director of the enterprise confirming that the enterprise does not own or lease any property and that the aforementioned is not responsible for payment of any municipal rates and taxes.

I,……., the undersigned, certify that the information furnished on this declaration form is correct and that I/we have no undisputed commitments for municipal services towards a municipality or other service provider in respect of which payment is overdue for more than 90 days.

…… ……

Signature for and on behalf of the bidder Date

MBD 9

CERTIFICATE OF INDEPENDENT BID DETERMINATION

1. This Municipal Bidding Document (MBD) must form part of all bids[1] invited.

2. Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by, firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging).[2] Collusive bidding is a *pe se* prohibition meaning that it cannot be justified under any grounds.

3. Municipal Supply Regulation 38 (1) prescribes that a supply chain management policy must provide measures for the combating of abuse of the supply chain management system, and must enable the accounting officer, among others, to:

   a. take all reasonable steps to prevent such abuse;

   b. reject the bid of any bidder if that bidder or any of its directors has abused the supply chain management system of the municipality or municipal entity or has committed any improper conduct in relation to such system; and

   c. cancel a contract awarded to a person if the person committed any corrupt or fraudulent act during the bidding process or the execution of the contract.

4. This MBD serves as a certificate of declaration that would be used by institutions to ensure that, when bids are considered, reasonable steps are taken to prevent any form of bid-rigging.

5. In order to give effect to the above, the attached Certificate of Bid Determination (MBD 9) must be completed and submitted with the bid:-

[1] *Includes price quotations, advertised competitive bids, limited bids and proposals.*
[2] *Bid rigging (or collusive bidding) occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and / or services for purchasers who wish to acquire goods and / or services through a bidding process. Bid rigging is, therefore, an agreement between competitors not to compete.*

CERTIFICATE OF INDEPENDENT BID DETERMINATION

I, the undersigned, in submitting the accompanying bid:

_____
(Bid Number and Description)

in response to the invitation for the bid made by **Stellenbosch Municipality**

do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf

of: _____ that:
(Name of Bidder)

6. I have read and I understand the contents of this Certificate;

7. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;

8. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;

9. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign, the bid, on behalf of the bidder;

10. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:-

    (a) has been requested to submit a bid in response to this bid invitation;

    (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and

    (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder.

11. 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[3] will not be construed as collusive bidding.

12. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:-
    (a) prices;
    (b) geographical area where product or service will be rendered (market allocation)
    (c) methods, factors or formulas used to calculate prices;
    (d) the intention or decision to submit or not to submit, a bid;
    (e) the submission of a bid which does not meet the specifications and conditions of the bid; or
    (f) bidding with the intention not to win the bid.

[3] 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.

13. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.

14. 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.

15. 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 exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No. 12 of 2004 or any other applicable legislation.

…… ……

SIGNATURE **DATE**

…… ……

POSITION **NAME OF BIDDER**

RESPONSIVENESS AND EVALUATION CRITERIA

1. **RESPONSIVENESS CRITERIA**

No bid will be considered by Stellenbosch Municipality unless it meets the following responsiveness criteria (for the bid to be considered responsive, the bid must meet the following requirements):

a) Bidders must ensure that they are registered on the Central Supplier Database (CSD), if they wish to conduct business with the Municipality.

b) Enquiries regarding the above can be directed to:

Contact persons	Tel no	Email address
Nicolene Hamilton	021 8088594	Nicolene.hamilton@stellenbosch.gov.za

2. Stellenbosch Municipality will reject a bid in terms of the following:

a) If any municipal rates and taxes or municipal service charges owed by the bidder or any of its directors to this of any other municipality or municipal entity, are in arrears for more than three months (90 days).

b) The name of the company of any of its director(s) names appear on the list of Tender Defaulters or restricted suppliers as published by National Treasury.

3. The following completed documents must be submitted or provided as part of the bid submission:

a) Copy of the B-BBEE Certificate issued by a Verification Agency accredited by SANAS or the

original Sworn Affidavit must be attached

(NB! BBBEE CERTIFICATES CAN BE VERIFIED WITH THE VERIFICATION AGENCY BUT A SWORN AFFIDAVIT MUST BE AN ORIGINAL AND NOT A COPY TO BE ELIGIBLE FOR BBBEE POINTS)

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

b) Completed and signed declaration of interest form (MBD 4).

4. No bids will be accepted unless the bid documentation as issued by the municipality is utilised.

5. The awarding of this bid is subject to the following:

a) Relevant technical specifications as stated in this bid document;
b) Attendance of compulsory site meetings, as may be applicable;
c) Proper completion of this bid document and signing of declarations
d) Documents as indicated in MBD 1.
e) Any special conditions of contract as stipulated in this bid document.

6. Persons aggrieved by decisions or actions taken in the implementation of this supply chain management system, may lodge within 14 days of the decision or action, a written objection or complaint against the decision or action.

7. **Inducements, rewards, gifts and favours to municipalities, officials and other role players**

a) No person who is a provider or prospective provider of goods or services, or a recipient or prospective recipient of goods disposed or to be disposed of may either directly or through a representation intermediary promise, offer or grant any inducement or reward to the Stellenbosch Municipality for or in connection with the award of a contract;

b) The accounting officer must promptly report any alleged contravention of subparagraph (1) to the National Treasury for considering whether the offending person, and any representative or intermediary through which such person is alleged to have acted, should be listed in the National Treasury's database of persons prohibited from doing business with the public sector.

8. **Telephonic, facsimile, electronic/ emailed and late bids will not be accepted.**

9. Bids shall be declare invalid, and shall be endorsed and recorded as such in the bid opening record by the responsible official to open the bid, in the following instances:
   a) If the bid is not sealed;
   b) if the bid including the bid price amount, where applicable is not submitted on the official pricing schedule;
   c) if the bid is not completed in non-erasable ink; or
   d) NO correction fluid/tape may be used
   e) if the name of the bidder is not stated, or is indecipherable

10. A bid will not be invalidated if the amount in words and the amount in figures do not correspond, in which case the amount in words shall be read out at the bid opening and shall be deemed to be the bid amount.

11. The official bid document must be fully completed in indelible ink.

12. All requested relevant and/ or additional documentation such as compliance certificates, professional registration, artisan qualification, etc., must be attached behind the bid document.

13. If the entity submitting a bid is a joint venture or consortium or partnership, each party to that formation must submit all the above information.

14. The bidder must adhere to the pricing instructions.

15. The Bidder's details must be provided.

16. The necessary document authorising the representative to sign and submit the bid on the bidder's behalf must be completed and signed.

17. The bid must comply with all the minimum technical specifications.

18. Alternative offers may be submitted by the bidder. The municipality is under no obligation to accept alternative offers.

19. **EVALUATION OF BIDS**

   a) All bids received shall be evaluated in terms of the Municipal Supply Chain Management Regulations, the Preferential Procurement Policy Framework Act no 5 of 2000, the Stellenbosch Preferential Procurement Policy of 2022/2023 in accordance with Preferential Procurement Regulations of 2022.

   b) The municipality reserves the right to accept all, some, or none of the bids submitted — either wholly or in part — and it is not obligated to accept the lowest bid.

PART C: TECHNICAL SPECIFICATIONS AND PRICING SCHEDULE

The following minimum specifications are applicable and must be complied with.

NB: Service providers are required to read and study the specification, its general condition of contract, as well as the instructions to them very carefully before submitting their offers.

All bids received shall be evaluated in terms of the Municipal Supply Chain Management Regulations, the Preferential Procurement Policy Framework Act no 5 of 2000, the Stellenbosch Preferential Procurement Policy of 2022/2023 in accordance with Preferential Procurement Regulations of 2022

PROVISION OF PROFESSIONAL SERVICES FOR THE DEVELOPMENT OF AN INVESTMENT PROSPECTUS AND MARKETING CAMPAIGN STRATEGY FOR THE STELLENBOSCH (WC024) MUNICIPALITY

1. INTRODUCTION

The Stellenbosch Municipality's Section: Economic Development Tourism, within the Directorate: Planning and Economic Development, aims to procure the services of a suitable and experienced Service Provider to develop an Investment Prospectus and Marketing campaign which will be integrated into the GIS System of the Stellenbosch Municipality.

2. PURPOSE

Stellenbosch Municipality has firmly established itself as a prime investment destination for a multitude of compelling reasons, making it a captivating choice for investors seeking both financial prosperity and a high quality of life.

An investment prospectus for the Stellenbosch Municipality will serve as a critical tool for attracting investment, building trust, and communicating the municipality's strategic vision to an audience of potential investors and stakeholders. It will allow investors to make informed decisions by providing a clear and honest assessment of the Stellenbosch Municipality's fiscal health.

3. SCOPE OF WORK

Goal 1: Development of a concise and informed investment prospectus for the Stellenbosch Municipality

OBJECTIVE	Output
To develop an investment prospectus for the Stellenbosch Municipality	**A concise and informed investment prospectus which will be integrated into the GIS System of the Stellenbosch Municipality**
The investment prospectus must include the following:	
1. Forward and Introduction	1.1) Provide a concise overview of the Stellenbosch Municipality 1.2) Highlight the intention of the investment prospectus 1.3) Why invest in the Stellenbosch Municipality 1.4) Welcome from Executive Management
2. Competitiveness of the Stellenbosch Municipality	2.1) The strategic location of the Stellenbosch Municipality (where the Municipality is located in relation to key markets, favourability of the position/location, natural resources and logistical infrastructure) 2.2) Provide an overview of the key comparisons (benchmarks) between Stellenbosch Municipality and other Municipalities in the Cape Winelands District and Western Cape Province across the following indicators: 2.2.1) Municipal enabling factors and improvement plans; 2.2.2) Infrastructure and service delivery; 2.2.3) Economic Development including but not limited to: unemployment rate; gross value added per capita; gross fixed capital formation per capita; etc. 2.2.4) Workforce capability and social environment. 2.2.5) Overall Municipal Competitive Index of Stellenbosch Municipality - to be obtained from SALGA 2.3) One-pager of Stellenbosch Municipality Investment Profile which presents general information of the Municipality in a useful and easy to understand manner 2.4) Highlight the higher learning institutions in the Stellenbosch Municipality 2.5) Overview and growth potential of Technopark and how this vibrant technology park contributes to the investment prospects of Stellenbosch Municipality
3. Local Overview and Business Conditions of the Stellenbosch Municipality	3.1) Logistical Connectivity including main transport networks; main cities and urban hubs; and the nature of the terrain and geography in relation to logistics). These points should be condensed into some form of indication as to how the logistical connectivity of the municipality will be advantageous to investors 3.2) Natural Resources and Geography. The categories of natural resources and geographic features to consider include: 3.2.1) Agricultural resources; 3.2.2) National parks and biodiversity zones; 3.2.3) Water resources / Electricity capacity / etc.; 3.2.4) Advantageous geography. Geographic features or aspects that can be developed or leveraged as part of tourism or other economic activities

	The focus should preferably be on those aspects that are not already established but rather undeveloped or underdeveloped. 3.3) Population and Demographics of Stellenbosch Municipality: 3.3.1) Total population – to give a sense of the general population size over a period of 5 years; 3.3.2) Race breakdown – the racial constitution must be presented in pie chart form; 3.3.3) Age breakdown/ Population pyramid; 3.3.4) Education breakdown. 3.4) Trade and Foreign Direct Investment Profile 3.4.1) Balance of trade: Exports minus imports; 3.4.2) Export and import statistics: Reflecting statistics across different categories; 3.4.3) Breakdown of largest import and export industries; and 3.4.4) Product breakdown of key import and export products. 3.5) Economic profile of the Stellenbosch Municipality: Sectors and Industry Composition 3.6) Key trends/factors affecting the local economy of Stellenbosch Municipality 3.7) Management and Governance of the Stellenbosch Municipality including but not limited to: Governance structure and policies; decision-making process; etc. 3.8) Overview of the local laws and regulations affecting investments 3.9) Partnerships and collaborations with key stakeholders, including but not limited to University of Stellenbosch, Local Tourism Organisations, Government Organisations, NGOs, Private Sector, etc.
4. Infrastructure and Development Plans	4.1) Overview of the current infrastructure of Stellenbosch Municipality including but not limited to Water Infrastructure; Electricity; Waste Services (Stellenbosch Infrastructure Plan) 4.2) Provide details of ongoing projects in Stellenbosch Municipality 4.3) Promotion of planned development projects and catalytic zones for Stellenbosch Municipality (Stellenbosch SDF) 4.4) How new developments will contribute to the investment potential of the Stellenbosch Municipality e.g., Adam Tas Corridor, Cape Winelands Airport 4.5) Promotion of planned Capital improvement plans for Stellenbosch Municipality (Stellenbosch Expenditure Framework)
5. Risk factors	5.1) The identification and assessment of potential risks which affects the operations of Stellenbosch Municipality 5.2) Economic, regulatory, or other factors that may impact the financial health of Stellenbosch Municipality 5.3) Propose mitigation strategies for managing identified risks
6. Investment Opportunities	6.1) Provide a clear description and understanding of investment opportunities available in Stellenbosch Municipality that will contribute to the economic development of the area 6.2) Focus on growth sectors and opportunities e.g. tourism; real estate; agriculture, industrial etc. 6.3) Showcase strategic projects that are aligned with the long-term goals of Stellenbosch Municipality (Stellenbosch Municipality catalytic projects)

	6.4) Specify what the Stellenbosch Municipality is doing to attract and welcome investment in the region - propose incentives for potential investors.
7. Municipal Planning and Development/ Investment Facilitation	7.1) Provide a clear understanding of the valid and relevant policies and regulatory items which guides the operations of Stellenbosch Municipality and has an impact on the investment environment 7.2) Municipal Investment Process
8. Spatially link investment potential zones through the Stellenbosch Municipality GIS System	8.1 The datasets must be in the form of feature classes or Esri geodatabases as the municipality uses the corporate Esri GIS system. The municipality will use Web Map Service (WMS) and Web Feature Services (WFS) to provide and exchange basic spatial data with the service provider

Goal 2: Design and develop a Marketing Campaign Strategy for the promotion of the Investment Prospectus

Objective	**Outcome**
To design and develop a marketing campaign strategy to promote the Investment Prospectus	**A developed marketing campaign strategy to promote investment in Stellenbosch Municipality**
The Marketing Campaign Strategy must include the following:	
1. Planning	1.1 Determine the goals and objectives of the marketing campaign
2. Identification of the target market	2.1 Define and segment the audience Stellenbosch Municipality aims to reach through the campaign
3. Creation of targeted content	3.1 Design and produce the content that matches the audiences' needs and interests including all graphics
4. Delivery of the marketing campaign	4.1 Identify appropriate channels and platforms for the effective distribution of the content to target audience
5. Measurement	5.1 Set key performance indicators and metrics to track the implementation and success of the marketing campaign

4. PROJECT DELIVERABLES

Deliverable #1: Inception Report

Requirement:	
ITEM	**Output**
1. Inception Report	The developed Inception Report must contain the following: 1.1 Overall research approach 1.2 Research Methodologies to be applied 1.3 Details of the project team that will be responsible for the execution of each stage of the project 1.4 Key timelines linked with deliverables

Deliverable #2: Preliminary Report

Requirement:	
ITEM	**Output**
1. Preliminary Report	Preliminary report which contains the following: 1.1 Full literature review of internal documentation including but not limited to: Stellenbosch Spatial Development Framework; Capital Expenditure Framework; Service Delivery and Budget Implementation Plan; relevant Policies and By-Laws; all Strategic Planning Documentation; Economic Development Strategy etc. 1.2 Full literature review of relevant external legislature and policies on Investment Promotion in South Africa and the Western Cape Province; 1.3 Draft outline of the components of the Investment Prospectus and Marketing Campaign Strategy

Deliverable #3: Draft Investment Prospectus and Marketing Campaign Strategy – PowerPoint Presentation

Requirement:	
ITEM	**Output**
1. Draft Investment Prospectus	Draft Investment Prospectus: 1.1 Summary of the Literature Review 1.2 Profile Stellenbosch Municipality as an investment destination 1.3 Include a factual study of the current investment climate of the Stellenbosch Municipality and its opportunities and challenges including: 1.3.1 Identified priority sectors and industry opportunities 1.3.2 Identified future development for Investment 1.3.3 Overview of current and planned infrastructure and development plans 1.3.4 Distinguish Stellenbosch Municipality from other regions 1.3.5 Investment opportunities in the Stellenbosch Municipality

	1.3.6 Risk factors that impact the operations of Stellenbosch Municipality and influences the investors' decisions 1.3.7 Regulations and legislation which guides the operations of Stellenbosch Municipality and Municipal Investment process to consider
2. Investment Zones Spatially linked through the GIS System	2.1 The datasets must be in the form of feature classes or Esri geodatabases as the municipality uses the corporate Esri GIS system. The municipality will use Web Map Service (WMS) and Web Feature Services (WFS) to provide and exchange basic spatial data with the service provider.
3. Draft Marketing Campaign Strategy to promote the Investment Prospectus to investors	Drat Marketing Campaign Strategy to promote the Investment Prospectus to investors: 3.1 Clear goals and objectives of the marketing campaign 3.2 Target Market the marketing campaign is aiming 3.3 Designed and produced marketing content 3.4 Identified channels and platforms for distribution of content 3.5 Key performance indicators and metrics to track the implementation and success of the campaign
4. Engagements with key internal and external stakeholders	4.1 Hosted engagements (maximum of two (2) engagements with a minimum of 30pax each) to present and discuss the Draft Investment Prospectus and Marketing Campaign with an audience of key internal and external stakeholders

Deliverable #4: Final Investment Prospectus and Marketing Campaign Strategy – PowerPoint Presentation

Requirement:	
ITEM	**Output**
1. Developed Investment Prospectus and Marketing Campaign Strategy	1.1 Developed Investment Prospectus which spatially links potential investment zones through the Stellenbosch Municipality GIS System 1.2 Designed and produced Marketing Campaign Strategy
2. Presentation of the Final Investment Prospectus and Marketing Campaign Strategy	2.1 Presentation of the Final Investment Prospectus and Marketing Campaign Strategy to Stellenbosch Municipality for approval (maximum of one (1) engagement).

a) The deliverables must be submitted to the Municipality on completion of the required work on the dates mutually agreed upon. All information collected during the course of the project must form part of the package (in electronic and hard copy format) submitted to the Municipality.

b) Only completed activities will be remunerated and payment will be subject

to receipt of deliverable and in accordance with the approved project plan and milestones.

5. PROJECT MANAGEMENT, REPORTING AND MEETINGS

The appointed service provider will be required to report to the Project Manager – Manager: Economic Development and Tourism who will be responsible for the management of the project on behalf of the Municipality. Meetings will take place either in person on suitable dates and venues of the Stellenbosch Municipality or via MS Teams.

6. COMPETENCIES OF SERVICE PROVIDER

6.1 The bid requires the provision of professional services, that must at least include the services of a Senior Economist, Researcher, GIS Technician registered at the South African Geomatics Council as a GIS Practitioner and Marketing Specialist with the necessary Graphic Designing expertise.

6.2 The service provider must have sound knowledge and proven experience in similar type of projects in a Municipality.

6.3 The project team members must be readily available and accessible for regular consultations and on-site meetings at Stellenbosch Municipality.

PRE-QUALIFYING CRITERIA

Minimum Required Expertise	Required Experience, Skills and expertise	Documents/ Information Required
Team Leader	• Minimum NQF 8 SAQA qualification in Economics and/ or Regional Town Planning • Minimum 5 years' experience in Economic Research, Economic Modelling/ Forecasting and Economic Strategy Development • Minimum 5 years' similar project management experience • Experience in Investment Development and Promotion • Experience in Strategy formulation and development	
Researcher	• Minimum NQF 7 SAQA qualification in Development Economics, Economics and/ or Regional Town Planning	

	• Minimum 5 years' experience in Economic Research • Experience in Economic Modelling/ forecasting and Economic Strategy development • Experience in investment development and promotion	
GIS Technologist	• Minimum NQF 7 SAQA qualification in geography, geomatics, environmental science, computer science • Minimum 3 years' experience in GIS Field/Geography • Proficiency in GIS software such as ArcGIS, QGIS, or other relevant platforms is essential. • Experience with spatial analysis, map production, data management, and geodatabase design is often required • Ability to perform spatial data analysis, including geoprocessing, spatial statistics, network analysis, • Understanding of database management concepts, such as data Modeling, query optimization, and spatial database systems	
Marketing Specialist	• Degree or diploma in Marketing • 5 years' experience in Marketing Research • Extensive experience in compilation of marketing content • Extensive experience in graphic design and layout of marketing material • Extensive experience of distribution of marketing content on different platforms and channels • 5 – 7 years' experience in Marketing Strategy Development	

*Failing to comply with any of the above pre-qualifying criteria will result in your bid being deemed non-responsive.

Eligibility: Previous experience in supply and delivery of same or similar services over a period of five (5) years. Service Provider must submit a minimum of three (3) different contactable references.			**Proof of previous contracts**	
Contract / Project Name	Contact Person / Company	Contact Number	Please indicate below. Proof documentation to be included in submitted documentation. Please indicate below	
1.			YES	NO
2.			YES	NO
3.			YES	NO

*Failure to complete the above table will invalidate your BID.

7. RESPONSIBILITY OF THE BIDDER

The following broad roles and responsibilities apply to the Service Provider during the duration of this project:

a) Management of service provider team.
b) Attend and participate in all meetings, workshops, briefing sessions, etc.
c) Submission of all deliverables required and as per Inception Report.
d) Submission of monthly progress reports as per template.
e) Performing all tasks which is required to successfully complete the project.
f) Prepare documents for discussion and present at meetings.
g) Preparation of Agenda and drafting, circulation, and corrections of action notes / minutes of meetings.
h) No work must be undertaken, which is claimed to be additional and outside of the scope of this bid without the written approval of the Project Manager (Municipal Official responsible for managing the project).

8. RESPONSIBILITY OF THE MUNICIPALITY

The following broad roles and responsibilities apply to the Municipality during the duration of this project:

a) Contractual and financial control.
b) Project leadership and management of critical path aspects.
c) Acceptance of all project deliverables.
d) Arrange the meetings, including the logistics such as invitations and booking of venues.
e) Chair and facilitate meetings.
f) Copying of documents as may be necessary prior to and after meetings.
g) Any publications and associated costs related thereto.
h) Branding of products.
i) Strategic guidance and available documentation and information throughout the process.
j) Municipal officials will make themselves available for the various agreed meetings and will review and make comments on all draft documents as per the agreed

schedules. A minimum of 10 working days should be provided for professional review.

9. PROJECT OR CONTRACT PERIOD

The timeframe envisaged for the total duration of the project is four months from date of appointment. The project proposal must indicate the exact timeframe and conform to this requirement.

10. RESPONSIVENESS OF QUALIFYING CRITERIA

Responsiveness in terms of this document refers to the bidder's adherence and compliance to the requirements set out in this section in order for the Municipality to evaluate their bid.

10.1 Administrative responsiveness:

a) Bid form must be properly received on the bid closing date and time specified on the invitation, fully completed, dated and signed in ink.
b) Submission of the bid documentation without removing any pages.
c) Submission of an original valid Tax Clearance Certificate, Business Registration Certificate e.g. CK1, certificate of incorporation and B-BBEE Status Level Verification Certificate.

10.2 Failure to submit the following documentation will invalidate your BID proposal:

a) **Resumes** of project team members to be allocated to the project with supporting evidence to clearly illustrate that the member complies with the competencies set out herein:
   i. a description of their technical competence in relation to the project's objectives;
   ii. a track record of relevant expertise (number of projects) and years' experience;
   iii. documentary evidence and detailed information regarding the required professional team members in accordance with the stated requirements. Any member of the proposed professional team whose submitted information fails to meet any of the minimum criteria, will invalidate this bid.

b) An outline of the project **approach and methodology**. The proposed methodology and project plan must set out an approach which responds to the proposed scope of work and articulates what the bidder is offering to provide. The bidder must set out their understanding of the objectives of the work, giving the stated and implied requirements, highlighting issues of importance and explaining the technical approach that would be adopted to address these.

c) **Project Plan** detailing roll out of the project including a work breakdown structure that complies with the scope of work, i.e.:

i. a detailed breakdown of the various tasks, key milestones, target dates and progress payments;

ii. a schedule of project team members allocated to the project, their positions and designations and hours they will be involved in the project as well as hourly rates; and

iii. detailed breakdown of budget and cash flows for each of the components. Professional Fees will cover all technical work, including mapping and GIS capture, disbursements and specialist inputs. Direct costs include cost of subsistence, travel, accommodation, photocopies, printing, data, telephone, equipment, etc.

11. INTELLECTUAL PROPERTY

11.1 Copyright, patent rights and other similar rights in any works, products or digital/spatial information created as a result of the performance of this tender and its assignments shall vest in and are hereby transferred to the Municipality, unless specifically agreed otherwise, in the form of individual written Agreement signed by both parties.

11.2 All information documents, digital/spatial information, records and books provided by the Municipality to the service provider in connection with the proposal or otherwise are strictly private and confidential. The Municipality reserves the right to disclose any information provided by the service provider to any of the employees of the Municipality.

12. DECLARATION OF CONFIDENTIALITY

The service provider shall regard all information in, or in support of the project, as confidential and may not use any information for personal or 3rd party gain. All communication with the media regarding this project (if any) will be conducted through the communication component of the Municipality.

13. PENALTIES

Failure to meet all the final deliverables by the delivery date will result in a deduction of a sum calculated on the delivered price of the delayed goods or unperformed services, using the current prime rate for each day of delay.

14. CONTACTABLE OFFICIALS FOR CLARIFICATION

Enquiries can be addressed to:

15.1 Enquiries related to **Bid Documentation** can be directed to:

Name of Official	Tel. number	Email Address
Bulelwa Dolomba	021 – 808 8521	Bulelwa.dolomba@stellenbosch.gov.za

15.2 Enquiries related to this **Terms of Reference** can be directed to:

Name of Official	Tel. number	Email Address
Joh-ne Jansen	021 808 8144	Joh-ne.jansen@stellenbosch.gov.za

15.3 Briefing Session

Date and time	Venue:	Contact person:
25 March 2024 at 12:00	Planning boardroom 2. 2nd Floor NPK Building. Cnr van Riebeeck and Ryneveldt Street	Ms Joh-ne Jansen 021 808 8144 Joh-ne.jansen@stellenbosch.gov.za
25 March 2024 at 12:00	Online via Teams	
• RSVP is essential for the in person briefing session. • Request for the Teams Link, please contact Ms Joh–ne Jansen as listed above.		

NONE COMPLIANCE TO SPECIFICATIONS WILL INVALIDATE YOUR OFFER

Note: It should be noted that the service will commence in 2023/2024 financial year.

Does your offer comply with these specifications? - Indicate YES or **NO**

1.1 Bidder's declaration I, _____ (bidder's name) representative of _____(company name) hereby confirm reading and understanding above mentioned requirements of this tender and is in full agreement with these terms and conditions. Signature: _____ Date: _____
RIGHTS OF THE MUNICIPALITY The Municipality reserves the right to accept any quote or part thereof and may adjust the extent of the job. The approved bidder must sign an indemnity form to accept the responsibility for any damages, loss of life, injuries or loss caused by his/their action to any municipal property, equipment or accessories. All insurances to cover the above mentioned, are for the contractors account. Successful contractors will indemnify the municipality against any claim that may arise from their operations.
Disclaimer: I hereby exempt Stellenbosch Municipality against any claim(s) for damages that may arise in the execution of thus formal quotation/tender/quotations in accordance with the Occupational Health and Safety (OHS) Act and its associated regulations. **Signed:** …… **Date: ……**

I, the undersigned, for and on behalf of the bidder, hereby confirm that I/we understand the information as stated above and that I/we will comply with all of the above.

……..	……..
Name (print)	**Signature**
……..	……..
Capacity	**Date**

In the event of any deviation from the minimum specifications, the bidder must attach details thereof to this bid document.

MBD 3.1

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

Name of bidder: ……	**Quotation number:** ……
Closing Time: ……	**Closing Date:** ……

OFFER TO BE VALID FOR 60 DAYS FROM THE CLOSING DATE OF BID.

NOTE:

1. **Only firm prices will be accepted. Non-firm prices will not be considered.**
2. **All delivery costs MUST be included in the bid price, for delivery at the prescribed destination.**
3. **Document MUST be completed in non-erasable black ink.**
4. **NO correction fluid/tape may be used.**
   a. **In the event of a mistake having been made, it shall be crossed out in ink and be accompanied by an initial at each and every alteration.**
5. **The Bidder MUST indicate whether he/she/the entity is a registered VAT Vendor or not.**
   a. **In the case of the Bidder not being a registered VAT Vendor, both columns (amount/rate excluding AND including VAT) must reflect the same amount.**

1.1 The Price Schedule for this contract is to be indicated as per the table below.

1.2 Ensure that the total of the Prices be carried to the Bid Form in this document, and the bid form signed. Failure to do so will invalidate your tender.

1.3 All information given in the Scope of Work must be considered for pricing.

1.4 All rates and prices in the Price Schedule are to be priced EXCLUSIVE of VAT, and VAT only added to the total of the Price column.

1.5 This price (Price after VAT) on this page, must be the same price on the breaking down on prices as well as your price on you company's letterhead.

1.6 Non-adherence to these conditions will automatically lead to disqualification

No	Item	Unit	Quantity (Proposed)	Rate/ Hour	Price (Quantity Proposed X Rate)
1	Inception Report	Hours		R	R
2	Preliminary Report	Hours		R	R
3	Draft Investment Prospectus and Marketing Campaign Strategy	Hours		R	R
4	Hosting of maximum 2 workshops to present and discuss the Draft Investment Prospectus and Marketing campaign Strategy with an audience of key internal and external stakeholders from Stellenbosch Municipality (WC024). The service provider must provide the necessary material, venue and catering for the workshops	Hours	2 workshops/ maximum 30 Participants per workshop	Rate/ person	R
5	Final Investment Prospectus and Marketing Campaign Strategy Plan (hard copies, soft copies and in PowerPoint Presentation)	Hours		R	R
6	Presentation (in person) of the final Investment Prospectus and Marketing Campaign Strategy for approval	2 Hours	1 session/ maximum 30 participants	Rate/ person	R
Total of items above, EXCLUSIVE OF VAT					**R**
Add VAT @ 15%					R
Provisional sum allowed for disbursements					R
15% Contingencies (Budget of Municipality, and not Bidder for unforeseen matters)					R
Total Price Offer					**R**

NB: Stellenbosch Municipality reserve the right to downward adjust the scope of work/ quantity required to stay within its budget, R300 000 threshold applicable.

Note: All cost must be included in price, and prices must be firm for the duration of the project within the above-mentioned threshold.

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

- **Does offer comply with specification? YES/NO**
- **If not to specification, indicate deviation(s) ……**
- **Is price firm for duration of contract YES/NO**
- **Period required for service delivery ……..……..**

VALUE ADDED TAX

The amended Value-Added Tax Act requires that a Tax Invoice for supplies in excess of R3 000 should, in addition to the other required information, also disclose the VAT registration number of the recipient, with effect from 1 March 2005.

The VAT registration number of the Stellenbosch Municipality is **4700102181**

CHECK LIST FOR COMPLETENESS OF BID DOCUMENT

The bidder is required to complete the following checklist in order to ensure that the necessary documentation, as required, is attached to this bid document and that all declarations are signed by the bidder:

(*Mark with "X" where applicable)

Items to be checked	Yes	No	Comments
1. Completed and signed MBD 1			
2. Authority to sign bid			
3. Completed the pricing schedule (MBD 3.1)			
4. Completed and signed declaration of interest (MBD 4)			
5. Completed and signed declaration in order to claim preference points (MBD 6.1) and attached a certified copy or original B-BBEE certificate as well as proof of address to claim locality points Copy of the B-BBEE Certificate issued by a Verification Agency accredited by SANAS or the original Sworn Affidavit must be attached (NB! BBBEE CERTIFICATES CAN BE VERIFIED WITH THE VERIFICATION AGENCY BUT A SWORN AFFIDAVIT MUST BE AN ORIGINAL AND NOT A COPY TO BE ELIGIBLE FOR BBBEE POINTS)			
6. Completed and signed declaration of bidder's past supply chain management practices (MBD 8)			
7. Completed and signed certificate of independent bid determination (MBD 9)			
8. Completed and signed certificate for municipal services and payments to service providers and attached a copy of your municipal account which is not older than 90 days			
9. Signed declaration for understanding and complying with technical specifications			
10. Bidder to initial every page of this bid document			

CERTIFICATION

I, THE UNDERSIGNED (FULL NAME)…….CERTIFY THAT THE INFORMATION FURNISHED ON THIS CHECK LIST IS TRUE AND CORRECT.

…….. **……**

Name (print) **Signature**

…… **……**

Position **Date**