



## REQUEST FOR QUOTATION (RFQ)

(VALUE BETWEEN R2 000 UPTO R30 000 - ALL TAXES INCLUDED)

Quotation Number:	RFQ202205/021 RE-ADVERT
Description:	ACTUARIAL VALUATION ON POST-RETIREMENT MEDICAL BENEFIT
Bid Closing Date:	15/06/2022
Compulsory Briefing Session:	N/A
Plant Addresses:	ERWAT HEAD OFFICE –FINANCE  Maps to sites are on our web site: <a href="http://www.erwat.co.za">www.erwat.co.za</a>
Contact Person	Albert.VanDerMerwe@erwat.co.za
Contact Number	011-929 7032
Validity period	3 working days

### SCOPE OF WORKS/SERVICES

**Suitably accredited, experienced and registered Service Providers are hereby invite to submit a quote for GRAP 25 valuations on Post-Retirement Medical Benefits for ERWAT.**

#### *Scope of Work:*

**Bidders are required to deliver the following to Ekurhuleni Water Care Company (ERWAT):**

- Liabilities of ERWAT in respect of post-employment medical benefit arrangements to employees.
- Projected expenses in respect of employee benefits in the year following the valuation date.
- Expected changes in the accrued liability over the year following the valuation date.
- Sensitivity analysis to demonstrate the variability of the result to changes in the more important assumptions used.
- Interpretation of results in results to focus management attention on the most important factors affecting the liability.
- Deliver a comprehensive report, a one-year liability projection (forecast) and disclosure requirements in terms of GRAP 25.
- Provide all information as required by the Auditor General and respond to auditor's queries if necessary.
- All reports and valuations must be compliant with all relevant legislation and professional guidelines.
- The valuation reports must be signed off by a member of the Actuarial Society of South Africa.

The appointed bidder will be required to commence within the second week in July 2022. The calculation will be done for the year end 30 June 2022.

Pricing:

DESCRIPTION	AMOUNT
Actuarial valuation on post-retirement medical benefit	R
VAT @ 15%	R
TOTAL	R

**Contact person:**

Kindly contact Mr Albert van der Merwe at 011 929 7032 or [Albert.VanDerMerwe@erwat.co.za](mailto:Albert.VanDerMerwe@erwat.co.za) for further queries relating to the scope of works.

**DELIVERY POINT**

ERWAT HEAD OFFICE

**GENERAL REQUIREMENTS:**

Bidders must furnish ERWAT with all details as provided for in Regulation 13 of the MFMA SCM Regulation dated 30 May 2005. Kindly complete the attached MBD and other forms to enable ERWAT to verify the information as required.

The successful bidder must be registered on National Treasury's Centralised Supplier Database ([www.csd.gov.za](http://www.csd.gov.za)).

Bidders submitting an offer for construction related services, must be registered with the Construction Industry Development Board ([www.cidb.org.za](http://www.cidb.org.za)).

All supporting documents applicable to this RFQ must be submitted with the submission of this bid and ERWAT reserves the right to request additional information for clarity, to award in part, in full or to not award it at all.

**QUOTATION REQUIREMENTS:**

Work/items/services offered that **DO NOT** comply with the specifications will not be evaluated.

Bidders must kindly submit a detailed quote as per the pricing schedule that must be completed in full, vat number (where applicable) must reflect on the quotation.

All quotes must be valid for a minimum of 30 working days.

**EVALUATION CRITERIA:**

**PLEASE NOTE THAT FAILURE TO COMPLETE THE ATTACHED FORMS AND SUBMIT THE FOLLOWING DOCUMENTS (UNLESS INDICATED OTHERWISE) WILL LEAD TO DISQUALIFICATION.**

**ALL DOCUMENTS SUBMITTED MUST BE VALID AND RELEVANT TO QUALIFY FOR FUTURE EVALUATION.**

- MBD 1: Invitation to bid;
- MBD 3.1: Pricing schedule – firm prices (purchases);
- MBD 4: Declaration of Interest;
- MBD 8: Declaration of bidder's past supply chain management practices;
- MBD 9: Certificate of independent bid determination;

**CSD Registration Number: MAAA\_\_\_\_\_**

- Valid Construction Industry Development Board Registration (CIDB): **Valid CRS number: \_\_\_\_\_ (for CIDB works where applicable).**
- Where a compulsory briefing/clarification/site meeting has been scheduled, bidders are required to attend such as indicate in the document. **Bidders whose name does not appear on the attendance register, will not be evaluated.**
- Briefing sessions must be attended by the company representative who has the technical knowledge to do so to ensure that bidders understand the requirements under the scope of works.

**SUBMISSION OF BIDS:**

**rfq@erwat.co.za**

**MBD 1**

**INVITATION TO BID**

YOU ARE HEREBY INVITED TO SUBMIT AN OFFER FOR RFQ202206/021 RE-ADVERT: ACTUARIAL VALUATION ON POST-RETIREMENT MEDICAL BENEFIT

**CLOSING DATE: 15 JUNE 2022 AT 12:00**

The successful bidder will be required to fill in and sign a written Contract Form (MBD7).

**Electronic Submissions**

**rfq@erwat.co.za**

***N.B.: Bidders must ensure that they submit the full bidding document with all the pages, all requested information completed and signed, including all supporting documents in the areas provided.***

***All bids must be submitted on the official forms – (not to be re-typed). Failure to complete the document in full may result in disqualification.***

***Bids completed in pencil, re-typed or where correction tape/fluid is used will be regarded as invalid bids.***

THIS BID IS SUBJECT TO THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE,

## ANY OTHER SPECIAL CONDITIONS OF CONTRACT

THIS BID WILL BE EVALUATED AND ADJUDICATED ACCORDING TO THE FOLLOWING CRITERIA:

1. Relevant specifications and technical proposals
2. Value for money
3. Capability to execute the contract
4. PPPFA & related regulations (including BBBEE)
5. General conditions of contract
6. Supporting documents where required

**NB: NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE (see definition on MBD 4 attached)**

**THE FOLLOWING PARTICULARS MUST BE FURNISHED  
(FAILURE TO DO SO MAY RESULT IN YOUR BID BEING DISQUALIFIED)**

*In the case of a Joint Venture – This page is to be completed and submitted in respect of each partner*

NAME OF ENTERPRISE			
PHYSICAL ADDRESS:			
POSTAL ADDRESS:			
CONTACT PERSON			
TEL NO: _____ CELL NO: _____ FAX NO: _____ EMAIL: _____			
COMPANY REGISTRATION NUMBER:			
BIDDERS ID NUMBER			
VAT NUMBER:		TAX REF NUMBER:	
CENTRALISED SUPPLIER DATABASE (CSD) NUMBER:		MAAA _____	
CIDB REGISTRATION NUMBER (IF APPLICABLE)			
CIDB GRADING			
ERWAT VENDOR NUMBER (NOT COMPULSORY):			

TOTAL BID PRICE/VALUE (INC. VAT) CARRIED OVER FROM BOQ/PRICING SCHEDULE: <i>(Kindly note that this price is not considered the total contract value)</i>		R _____ INCLUDING VAT			
TOTAL NUMBER OF ITEMS OFFERED					
* PREFERENCE POINTS CLAIMED AS PER FORM MBD 6.1	B-BBEE RATING [LEVEL ____ ]	VALID B-BBEE CERTIFICATE ATTACHED	Yes		No
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS/SERVICES/WORKS OFFERED?			Yes		No
DISABLED [ ____%]      WOMEN [ ____%]      YOUTH [ ____%]					

**\*IF YES, WHO WAS THE CERTIFICATE ISSUED BY?**

A VERIFICATION AGENCY ACCREDITED BY THE SOUTH AFRICAN NATIONAL ACCREDITATION SYSTEM (SANAS) ☐  
 A REGISTERED AUDITOR ☐  
 A SWORN AFFIDAVIT ☐  
*(tick applicable block)*

**(A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE OR SWORN AFFIDAVIT (SEE MBD6.1) 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	
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NAME AND SURNAME: \_\_\_\_\_

SIGNATURE OF BIDDER: \_\_\_\_\_

CAPACITY UNDER WHICH THIS BID IS SIGNED: \_\_\_\_\_

DATE: \_\_\_\_\_

**ANY ENQUIRIES REGARDING THE BIDDING PROCEDURE AND TECHNICAL INFORMATION MAY BE DIRECTED TO:**

**SUPPLY CHAIN BIDDING PROCEDURES:**

CONTACT PERSON: SPECIALIST: BRENDA OR PHUMZILE

CONTACT DETAILS: (TEL) 011 929 7000

E-MAIL:

**TECHNICAL QUERIES MAY BE DIRECTED TO:**

CONTACT PERSON: END USER/REQUESTOR/SUPERVISOR

CONTACT DETAILS: (TEL) 011 929 7032

IL: [Albert.VanDerMerwe@erwat.co.za](mailto:Albert.VanDerMerwe@erwat.co.za)

FOR ERWAT OFFICE USE ONLY:  
VERIFIED ☐ YES / ☐ NO

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: \_\_\_\_\_

RFQ202205/021:RE-ADVERT ACTUARIAL VALUATION ON POST-RETIREMENT MEDICAL BENEFIT

CLOSING DATE: 15 JUNE 2022 AT 12:00

OFFER TO BE VALID FOR **(30) DAYS** FROM THE CLOSING DATE OF BID.

- 
- REQUIRED BY: **EKURHULENI WATER CARE COMPANY**
  - AT: \_\_\_\_\_ SECTION
  - BRAND AND MODEL \_\_\_\_\_ OFFERED
  - COUNTRY OF ORIGIN \_\_\_\_\_

- DOES THE OFFER COMPLY WITH ALL SPECIFICATIONS? **YES/NO\***
- IF NOT TO SPECIFICATION, INDICATE DEVIATION(S) AND SUBMIT FULL TECHNICAL DETAIL AND DRAWINGS ON DEVIATIONS

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- DELIVERY PERIOD: \_\_\_\_\_ DAYS/WEEKS/MONTHS
- DELIVERY BASIS: \_\_\_\_\_ FIRM/NOT FIRM

Bid prices must be fixed and firm for the duration of the contract period until the product/service has been delivered/finalised.

**MBD 4**

### **DECLARATION OF INTEREST**

1. No bid will be accepted from persons in the service of the state.
2. Any person, having a kinship with persons in the service of the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid. In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons connected with or related to persons in 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. A Person who is an advisor or consultant contracted with the municipality.
4. In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

4.1 Full Name of bidder or his or her representative:

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4.2 Identity Number:

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4.3 Position occupied in the Company (director, trustee, shareholder<sup>2</sup>):

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4.4 Company Registration Number: \_\_\_\_\_

4.5 Tax Reference Number: \_\_\_\_\_

4.6 VAT Registration Number: \_\_\_\_\_

4.7 The names of all directors / trustees / shareholder's members, their individual identity numbers and state employee numbers must be indicated in paragraph 5 below.

4.8 Are you presently in the service of the state? **YES / NO**  
If so, furnish particulars.

\_\_\_\_\_  
\_\_\_\_\_

4.9 Have you been in the service of the state for the past twelve months? **YES / NO**  
If so, furnish particulars.

\_\_\_\_\_  
\_\_\_\_\_

4.10 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**  
If so, furnish particulars.

\_\_\_\_\_  
\_\_\_\_\_

4.11 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**  
If so, furnish particulars.

\_\_\_\_\_  
\_\_\_\_\_

4.12 Are any of the company's directors, trustees, managers, principle shareholders or stakeholders in service of the state? **YES / NO**  
If so, furnish particulars.

\_\_\_\_\_  
\_\_\_\_\_

4.13 Are any spouse, child or parent of the company's directors, trustees, managers, principle shareholders or stakeholders in service of the state? **YES / NO**  
If so, furnish particulars.

\_\_\_\_\_  
\_\_\_\_\_



- 4.14 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

If so, furnish particulars.

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

FULL NAME	IDENTITY NUMBER	STATE EMPLOYEE NUMBER

**1 MSCM Regulations: "in the service of the state" means to be –**

- (a) A member of –
- any municipal council/entity;
  - any provincial legislature; or
  - 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.

<sup>2</sup> 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.

### **CERTIFICATION**

I, THE UNDERSIGNED (NAME) \_\_\_\_\_  
 CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM IS CORRECT.

I ACCEPT THAT THE STATE MAY ACT AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.

\_\_\_\_\_  
 SIGNATURE

\_\_\_\_\_  
 DATE

\_\_\_\_\_  
 POSITION

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

**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 company'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 of Restricted Suppliers as companies or persons 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 Accounting Officer/Authority of the institution that imposed the restriction after the <i>audi alteram partem</i> rule was applied).  The Database of Restricted Suppliers now resides on the National Treasury's website ( <a href="http://www.treasury.gov.za">www.treasury.gov.za</a> ) and can be accessed by clicking on its link at the bottom of the home page.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.1.1	If so, furnish particulars:		
4.2	Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)?  The Register for Tender Defaulters can be accessed on the National Treasury's website ( <a href="http://www.treasury.gov.za">www.treasury.gov.za</a> ) by clicking on its link at the bottom of the home page.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.2.1	If so, furnish particulars:		
4.3	Was the bidder or any of its directors convicted by a court of law (including a court of law outside the Republic of South Africa) for fraud or corruption during the past five years?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

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

\_\_\_\_\_  
**SIGNATURE ON BEHALF OF BIDDER**

## MBD 9

**CERTIFICATE OF INDEPENDENT BID DETERMINATION**

1. This Municipal Bidding Document (MBD) must form part of all bids<sup>1</sup> 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).<sup>2</sup> Collusive bidding is a *per 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:

**CERTIFICATE OF INDEPENDENT BID DETERMINATION**

I, the undersigned, in submitting the accompanying bid:

**RFQ202205/021:RE-ADVERT ACTUARIAL VALUATION ON POST-RETIREMENT MEDICAL BENEFIT**

in response to the invitation for the bid made by:

**EKURHULENI WATER CARE COMPANY (ERWAT)**

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

I certify, on behalf of \_\_\_\_\_ (Name of Bidder) that:

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
4. 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;
5. 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
6. 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>3</sup> will not be construed as collusive bidding.
7. 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.
8. 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.
9. 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.
10. 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.

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**SIGNATURE**

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**DATE**

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**POSITION**

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**NAME OF BIDDER**