



## TENDER NOTICE

Notice No: 2016/2017-137

Bids are hereby invited from suitably experienced Service Providers for the project stated below:

BID NO	DESCRIPTION	ADVERTISING DATE	CLOSING DATE
MATAT 2016/2017-54	MANAGEMENT OF MEDIUM TERM INSURANCE PORTFOLIO FOR A PERIOD OF THREE(3) YEARS	28 APRIL 2017	29 MAY 2017 @ 12h00

Bid Documents will be obtainable at the **New Budget and Treasury Office**, MATATIELE LOCAL MUNICIPALITY, Mountain View for a **non – refundable tender fee of R500.00** payable between the hours of 08h00 and 16h00 as from **04 May 2017**.

### **Bidders shall take note of the following bid conditions / Compulsory Submissions**

- All bids submitted should remain valid for a period of **90 days** after the bid closing date.
- Original Valid Tax Clearance Certificate, or code from SARS
- The bid will be evaluated according to the preferential procurement model in the Preferential Procurement the bidders' attention is drawn to Form MBD 6.1 whereby bidders other than EMEs must submit their original and valid B-BBEE status level verification certificate or a certified copy thereof, substantiating their B-BBEE rating issued by a Registered Auditor approved by IRBA or a Verification Agency accredited by SANAS. **Failure to do so will result in zero points score for BBEE status level.**
- **Certified copies of original company registration and certified ID documents of members, failure to do so will result in disqualification.**
- Joint Venture agreement (where applicable)
- **Failure to complete all supplementary information returnable schedules like MBD 4, MBD8 and MBD 9 will result in the tender being eliminated, Invalid or non-submission of the documents listed in the Terms of Reference will lead to a disqualification.**
- Bids must only be submitted on documentation provided by the municipality. Late, emailed, faxed and telegraphic bids will not be considered and photocopies of the document will not be accepted.
- **Bidders are required to submit the audited annual financial statements for the past three financial years or since their establishment during the past three years and failure to submit will lead to disqualification.**
- All prospective service providers of goods and services and infrastructure procurement are required to apply on **Central Supplier Database** in order to do business with all organs of state in the Republic of South Africa at <https://secured.csd.gov.za/>. Matatiele Local Municipality is using CSD to verify supplier's registration, therefore, you are required to please register on the CSD.
- Bidders are required to submit rates clearances certificates from municipality.
- Bidders are required to submit proof of registration with insurance governing bodies **South African Insurance Association (SAIA), Financial Services Board (FSB) and failure to submit will lead to disqualification.**

The Bids will be evaluated on the basis of the Preferential Procurement Policy Framework Act (Act No.5, 2000), and the regulations pertaining thereto (2017), as well as the Matatiele Local Municipality's Supply Chain Management policy. 80/20 preference point system will be used. The bids will be evaluated in two stages, namely:

- Stage 1- Functionality
- Stage 2-Price and BBEE Points

Price	(80)
BBBEE Points	(20)

With regards to functionality the following criteria will be applicable and the maximum points will be 100.

No	Criteria	POINTS
1.	<b>Experience of the tenderer (enterprise) in years of operation as Short-Term Insurance Portfolio Manager</b> <ul style="list-style-type: none"> <li>• More than 10 years in operation = (30 points)</li> <li>• Between 5 and 10 years in operation = (20 points)</li> <li>• Less than 5 years in operation = (10 points)</li> </ul>	<b>30</b>
2.	<b>Track record of the tenderer with institutional clients</b> <ul style="list-style-type: none"> <li>• More than 20 clients = (20 points)</li> <li>• Between 10 and 20 clients = (15 points)</li> <li>• Between 5 and 10 clients = (10 points)</li> <li>• Less than 5 clients = (5 points)</li> </ul>	<b>20</b>
3.	<b>Track record of the tenderer with local government institutions</b> <ul style="list-style-type: none"> <li>• More than 20 clients = (30 points)</li> <li>• Between 15 and 20 clients = (25 points)</li> <li>• Between 10 and 15 clients = (20 points)</li> <li>• Between 5 and 10 clients = (15 points)</li> <li>• Less than 5 clients = (5 points)</li> </ul>	<b>30</b>
4.	<b>Experience of the tenderer (enterprise) in years of operation as Short-Term Insurance Claims Administrator</b>	<b>10</b>
5.	<b>Experience of the tenderer (enterprise) in years of operation as Short-Term Insurance Junior Portfolio Manager</b>	<b>10</b>
	<b>TOTAL SCORE</b>	<b>100</b>

Only bidders scored 85 points out of 100 in respect of “functionality” will be evaluated further and therefore eligible for the award, and bidders scored less than 85 points will be considered non responsive.

Bids must only be submitted on the bid documentation provided by the municipality. Two envelopes system will be used - Each bid must comprise of a Technical offer and a financial offer, each of which must be submitted separately and both offers must be clearly marked the name of the bidder, failing which will lead to disqualification.

Bids must be submitted in a sealed envelope clearly marked “MANAGEMENT OF MEDIUM TERM INSURANCE PORTFOLIO FOR A PERIOD OF THREE(3) YEARS ”Notice No: 2016/2017-137” must be

deposited in the Bid Box located at the New Budget and Treasury Offices, Mountain View, Matatiele 4730.

***Matatiele Local Municipality does not bind itself to accept the lowest or any bid and reserves the right to accept the Bid in whole or part, at the rates quoted.***

Technical enquiries should be directed to **Mr S. Fokazi (Manager: Asset Management & Financial Reporting)** at **039 737 8100** and SCM enquiries to **Ms. O Mgwebi: SCM** at **039 737 8100** during office hours.

**DR D.C.T NAKIN**

**MUNICIPAL MANAGER**