



Enterprise iLembe is the Economic Development Agency of the iLembe District Municipality, responsible for Trade & Investment Promotion and Local Economic Development for the region

## REQUEST FOR QUOTATIONS (27/01/2022)

### THE APPOINTMENT OF A PANEL OF SERVICE PROVIDERS FOR THE PROVISION OF ACCOUNTING, TAX AND RELATED SUPPORT SERVICES

Enterprise iLembe invites proposals from experienced, suitably qualified, Accounting and Tax Firms for the provision of Accounting, Tax and related Support Services as and when required by the Entity.

Detailed specifications can be obtained from the Enterprise iLembe website [www.enterpriseilembe.co.za](http://www.enterpriseilembe.co.za) or upon request via e-mail to [siyabongasi@enterpriseilembe.co.za](mailto:siyabongasi@enterpriseilembe.co.za)

It is compulsory for service providers to be registered on the Central Suppliers Database (CSD) for Government. Please visit <https://secure.csd.gov.za/> to register on the database.

#### **Quotations must be accompanied by the following documents:**

- Valid TCS Pin number issued by SARS (compulsory)
- Proof of registration on the Central Suppliers Database (compulsory). (The registration number/report will be available on the CSD Website once you have registered)
- B-BBBEE Status Level Certificate (if you have)
- MBD 4 – Declaration of Interest Form (Compulsory)
- Company registration documents (compulsory)
- Proof banking details/ Bank Confirmation (compulsory)

All proposals will be evaluated and adjudicated in terms of the approved Supply Chain Management Policy of Enterprise iLembe on the 80/20 Preferential Procurement points system read together with the 2017 Preferential Procurement Regulations.

**All quotations must be e-mailed to [siyabongasi@enterpriseilembe.co.za](mailto:siyabongasi@enterpriseilembe.co.za) on or before 04 February 2022 at 11h00. No submissions will be considered after the closing date and time.**

**Mr. L. Mncube**

**CEO**

**MBD 4**

**DECLARATION OF INTEREST**

1. No bid will be accepted from persons in the service of the state<sup>1</sup>.
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, hareholder<sup>2</sup>):.....

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. ....

.....

<sup>1</sup>MSCM Regulations: "in the service of the state" means to be –

- (a) a member of –
  - (i) any municipal council;
  - (ii) any provincial legislature; or
  - (iii) the national Assembly or the national Council of provinces;
- (b) a member of the board of directors of any municipal entity;
- (c) an official of any municipality or municipal entity;
- (d) an employee of any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No.1 of 1999);
- (e) a member of the accounting authority of any national or provincial public entity; or
- (f) an employee of Parliament or a provincial legislature.

<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.

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.....

.....

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.

<b>Full Name</b>	<b>Identity Number</b>	<b>State Employee Number</b>

.....  
**Signature**

.....  
**Date**

.....  
**Capacity**

.....  
**Name of Bidder**



**enterprise ilembe**  
ECONOMIC DEVELOPMENT AGENCY

## **TERMS OF REFERENCE**

***FOR***

**THE APPOINTMENT OF A PANEL OF SERVICE PROVIDERS FOR THE PROVISION  
OF ACCOUNTING, TAX AND RELATED  
SUPPORT SERVICES**

**Closing Date: 04 February 2022  
Time: 11h00**

*It is the intention of Enterprise iLembe to enter into a formal contract with a service provider or consortium to provide the services described herein. These Terms of Reference and the consultant's proposal will form the basis of the contract.*

## **Section 1: Details**

<b>Province:</b>	KwaZulu-Natal
<b>Municipality:</b>	iLembe District Municipality and the local municipalities comprising of KwaDukuza, Mandeni, Maphumulo & Ndwedwe
<b>Contracting Agency:</b>	Enterprise iLembe Economic Development Agency
<b>Project Name:</b>	Appointment of a Panel of Service Providers for the Provision of Accounting, Tax and Related Support Services

## **Section 2: Summary of Brief**

It is the intention of Enterprise iLembe to appoint a Panel of Accounting and Tax Firms for the provision of Accounting, Tax and related Support Services as and when required by the Entity.

## **Section 3: Background**

### **Introduction:**

#### **The iLembe District Municipality**

The iLembe District Municipality is situated on the east coast of South Africa, in the KwaZulu-Natal Province. iLembe is one of the 11 district municipalities of KwaZulu-Natal province in South Africa and also the smallest District Municipality in the province, with a total population of just over 657000. iLembe is located between two of Africa's busiest ports, Durban and Richards Bay, iLembe is therefore well situated not only to local but also international markets.

## **Enterprise iLembe**

Enterprise iLembe is an economic development agency wholly-owned by the iLembe District Municipality mandated to drive economic development and promote trade and investment in the key sectors of agriculture, tourism, manufacturing and property and construction.

### **Section 4: Specifications**

Enterprise iLembe currently utilizes the following systems:

- Munsoft (Accounting system)
- SAGE VIP (HR/ Payroll system)

Service providers would be required to perform the following services, as and when required by the Entity:

- Accountancy;
- Tax and;
- Other related services.

It must be noted that this is a panel appointment on an ad hoc basis (as and when the need arises) for a duration of one year from the date of appointment. Once the appointment of the panel has been made, Enterprise iLembe will request quotations from at least three panel members according to their areas of expertise.

### **Section 5: Payment Terms**

Payments will be made on invoices submitted for work completed as per achieved milestone. On receipt of invoices rendered the service provider should allow at least 30 days for the payments to be processed.

### **Section 6: Non - Appointment**

Enterprise iLembe has a right not to make an appointment should it find that proposals received do not meet the specified criteria / requirements and is not compelled to accept the lowest quotation.

## Section 7: Requirements Related to this Proposal

The validity period of the proposal is 90 days from the date of RFQ closure.

Please note that no awards will be made to bidders who are in service of the state as per the CSD verification that will be performed during the course of the bid evaluation process.

### Submission of Proposals

Proposals must be submitted via **e-mail** to [siyabongasi@enterpriseilembe.co.za](mailto:siyabongasi@enterpriseilembe.co.za) on or before the 04 February 2022 at 11h00.

### Information Contact

Name: Ms. Phumelele Sibiya

Tel: 032-946 1256

E-mail: [phumelele@enterpriseilembe.co.za](mailto:phumelele@enterpriseilembe.co.za)

## Section 8: Adjudication Criteria

### Procurement Policy

Proposals will be evaluated in terms of the Procurement Policy of Enterprise iLembe and shall be applied as follows: -

- All proposals received shall firstly be evaluated on functionality and thereafter only those who qualify for the next stage of evaluation will be evaluated in terms of the PPPFA (No.5 of 2000) read together with the 2017 PPPFA Regulations and the 2011 B-BBEE Regulations.

**Any proposal that fails to achieve a minimum of 60 points of the total of 100 and a score greater than zero for competencies marked with an asterisk (\*) on the functionality evaluation shall not be evaluated further and will be deemed to be non-responsive.**

## **8.1 Functionality Evaluation**

The functionality evaluation points will be applied as per the table below;

### ***Competencies:***

**NB:** Bidders must demonstrate by submitting documentary proof in relation to the claim of points with respect to the following key competencies/areas in order to claim points in the functionality evaluation:

#	Competency	Point Allocation	Maximum Points
1	<p><b>Qualifications of the team members relevant to Accountancy, Tax, Auditing, Management Accounting</b></p> <p>(Please submit certified copies of qualifications for up to 5 team members) (* )</p>	<ul style="list-style-type: none"> <li>• No qualification - 0</li> <li>• National Certificate - 15</li> <li>• National Diploma/Degree - 20</li> <li>• Post graduate - 40</li> </ul>	40 points
2	<p><b>Proof of previous experience of the firm in Accountancy, Tax and/ or related services</b></p> <p>(Please submit relevant, <b>SIGNED</b> reference letters to claim points for this)</p>	<p>0 letters – 0 points</p> <p>1 Letter – 5 points</p> <p>2 Letters – 10 points</p> <p>3 Letters – 15 points</p> <p>4 Letters – 20 points</p>	40 points
3	<p><b>Location of Bidder</b></p> <p>(Please submit Proof of location of the business i.e., Utility Bill, Signed Councillor letter, or Signed Lease Agreement)</p>	<p>Within iLembe – 20 points</p> <p>Within KZN -15 points</p> <p>Within RSA – 10 points</p> <p>Outside borders of RSA – 0 points</p>	20 points

**NB:** Reference checks may be conducted during the course of the evaluation process.

Only bidders who achieve a total of 60 points of the total of 100 and a score greater than zero for competencies marked with an asterisk (\*) for functionality in terms of the above will then be evaluated in terms of the 80/20 points scoring system.

## **8.2 The 80/20 Preference Point Scoring System**

The 80/20 preference point scoring system will be applied with points allocated as follows: -

- 80 points for the price;
- 20 points for B-BBEE status level

***Bidders wishing to claim preferential points must attach B-BBEE certificate/ Affidavit.***

The 20 preference points will be allocated based on B - BBEE status level of contribution and shall be allocated as per table below: -

<b>Status Level of Contributor</b>	<b>Preference Points on scorecard (80/20 System)</b>
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-contributor	0

## Section 9: Required Annexures

### 1. Service Providers Proposal

### 2. Registration details & Compliance

- All interested bidders must be registered on the Central Supplier Database for Government. Proof of registration on the CSD must be included in the bidder's proposal. **(Compulsory)**. Please visit <https://secure.csd.gov.za/> to register on the Central Supplier Database. The CSD will be used to verify tax compliance status of the bidder. NB: Bidders who are in service of the state as per CSD will be disqualified from further evaluation unless supporting documents proving the supplier is not a government employee is submitted as part of the proposal.
- All bidders must submit a Tax Compliance Status (TCS) Pin Number **(Compulsory)**. In line with the latest circular from SARS (South African Revenue Services), bidders can now submit a **UNIQUE PIN** to enable the entity to verify the bidder's tax compliance status online via E-filing or via the CSD.
- MBD 4 Forms which will be circulated with this document **(Compulsory)**. Please note that the SBD forms will not be accepted.
- All supporting documents as detailed in the competency table on page 5 of this document.
- Proof of Banking details/ Bank confirmation letter **(Compulsory)**.
- Company registration documents showing all active members/ directors/ shareholders/ owners etc. **(Compulsory)**.
- B-BBEE Verification Certificate/ Affidavit (Please attach the approved B-BBEE accreditation certificate/ affidavit if available in order to claim points for this.)