



## REQUEST FOR BIDS

**RFB NUMBER** : SHRA/RFB/CAR/01/202425

**CLOSING DATE** : 04 November 2024

**TIME** : 11H00

**DESCRIPTION** : **The appointment of a panel of service providers to conduct Building Condition Inspections (BCI) for a period of three (3) years**

**BRIEFING:** Yes  No

## **DOCUMENTS IN THIS BID DOCUMENT PACK**

Bidders are to ensure that they have received all pages of this document, which consist of the following documents:

### **SECTION A**

1. Background
2. RFB Submission Conditions and Instructions
3. Terms of Reference
4. Evaluation Criteria
5. Evaluation Process
6. Handbook for conducting Building Condition Audits (Annexure A)

### **SECTION B**

1. Special Conditions of Bid and Contract
2. General Conditions of Contract (Annexure B)
3. Invitation to Quote (SBD 1)
4. Pricing Schedule (SBD 3.3)
5. Declaration of Interest (SBD 4)
6. Preference Points Claim form in terms of Preferential Procurement Regulations 2022 (SBD 6.1)
7. Submission Checklist

## **SECTION A**

### **1. BACKGROUND**

The Social Housing Regulatory Authority (“SHRA”) was established by the National Department of Human Settlements as prescribed by the Social Housing Act (Act 16 of 2008). The SHRA is classified as a national public entity listed under Schedule 3A of the Public Finance Management Act (Act 1 of 1999) (“PFMA”).

The SHRA has been operational since January 2011, with a mandate to regulate, invest in and capacitate the social housing sector. The social housing programme aims to deliver affordable rental housing for low to medium income groups, currently these are households whose income levels are between R1 850 and R22 000. There are social housing projects throughout all nine (9) provinces.

The delivery and management of social housing units and projects is done through accredited Social Housing Institutions (SHIs) and private sector companies known as other delivery agents (ODAs) collectively defined as social housing landlords (SHLs).

#### **1.1 MISSION**

To ensure there is quality housing for lower- to middle-income households in integrated settlements by investing in, enabling, regulating, and transforming the affordable social housing rental market.

#### **1.2 VISION**

To create an integrated South Africa where citizens live a good quality life in well-located, affordable, and quality rental homes.

#### **1.3 FUNCTIONS**

- Promote the development and awareness of social housing by providing an enabling environment for the growth and development of the social housing sector.
- Provide advice and support to the National Department of Human Settlements in its development of policy for the social housing sector and facilitate national social housing programmes.
- Provide best practice information and research on the status of the social housing sector.
- Support provincial governments with the approval of project applications by social housing institutions.
- Provide assistance, when requested, with the process of the designation of restructuring zones.
- Enter into agreements with provincial governments and the National Housing Finance Corporation to ensure the co-ordinated exercise of powers

## 2. RFB SUBMISSION CONDITIONS AND INSTRUCTIONS

### 2.1 FRAUD AND CORRUPTION

2.1.1 All bidders are to take note of the implications of contravening the Prevention and Combating of Corrupt Activities Act, Act No 12 of 2004 and any other Act applicable.

### 2.2 COMPULSORY BRIEFING SESSION

2.2.1 ***To be considered, all potential respondents must attend a compulsory briefing session on Tuesday, 15 October 2024 at 11h00 via the Teams platform.***

2.2.2 ***Bidders are to register on this link <https://forms.office.com/Pages/ResponsePage.aspx?id=5SZXEG8BxE6KstRzJucuy5r1aSy2uapBuiriyzbdHcRURUtTSEVMQzq4SEk1Mk1aVFVYUFBYWks4Ni4u> by Monday 14 October 2024 @ 00h00 (midnight) to receive the Teams link to join briefing session.***

### 2.3 CLARIFICATIONS/QUERIES

2.3.1 Any clarification required by a bidder regarding the meaning or interpretation of the Terms of Reference, or any other aspect concerning the bid, is to be requested in writing (e-mail) to Ms. Dziphathutshedzo Nevari at [tnevari@shra.org.za](mailto:tnevari@shra.org.za) by **Friday 25 October 2024 at 16h00**. The bid number should be mentioned in all correspondence. Telephonic requests for clarification will not be accepted. If appropriate, the clarifying information will be made available to all bidders by e-mail only.

### 2.4 SUBMITTING BIDS

#### **ONE HARD COPY AND ITS SOFT COPY IN USB FORMAT.**

Faxed or e-mailed bids will not be accepted.

Bids should be submitted in a sealed envelope, marked with:

- RFB number: **SHRA/RFB/CAR/01/202425**
- Closing date and time: **04 November 2024 @11h00**
- The name and address of the bidder

**Documents submitted on time by bidders shall not be returned.**

### 2.5 LATE BIDS

2.5.1 Bids received late shall not be considered. A bid will be considered late if it arrived only one second after 11h00 or any time thereafter. Bids arriving late will not be considered under any circumstances. Bids received late shall be returned unopened to the bidder.

- 2.5.2 Bidders are therefore strongly advised to ensure that bids be despatched allowing enough time for any unforeseen events that may delay the delivery of the bid.
- 2.5.3 The official Telkom time (dial 1026) will be used to verify the exact closing time (11h00)
- 2.5.4 Bids sent to SHRA via normal post, or any other mechanism (other than personal delivery in the bid box by the bidder) shall be deemed to have been received on the date and at the time of arrival at the SHRA premises (tender/bid box or reception). Bids received at the physical address after the closing date and time of the bid, shall therefore be deemed to be received late.

## **2.6 DIRECTIONS TO SHRA OFFICE FOR DELIVERY OF BIDS**

- 2.6.1 Bidders should allow time to access the premises due to security arrangements that need to be observed.

## **2.7 FORMAT OF BIDS**

- 2.7.1 Bidders must complete all the necessary bid documents and undertakings required in this bid document. Bidders are advised that their bid should be concise, written in plain English and simply presented.
- 2.7.2 Bidders are to set out their bid in the following format:

### **Part 1: Invitation to Bid**

Bidders must complete and submit the Invitation to Bid document.

### **Part 2: Pricing Schedule**

Bidders must complete and submit the pricing schedule document.

The appointed Service Provider will:

- Claim travel costs applicable to this contract as per the AA rates.
- Book only economy class flight and preferably Group B are to be used for Service Providers.
- Book accommodation in line with the allowable rates as published by the National Treasury in Instruction Note 7 of 2022/23.

**The value of this bid is estimated not to exceed R50 000 000 (all applicable taxes included) and therefore the 80/20 system shall be applicable**

### **Part 3: Declaration of Interest**

Each party to the bid must complete and submit the Declaration of Interest.

### **Part 4: Preference Points Claim Form in terms of the Preferential Procurement Regulations 2022**

Bidders must complete and submit the Preference Points Claim Form.

A trust, consortium or joint venture:

- will qualify for points for their specific goals as a legal entity, provided that the entity submits their B-BBEE status level certificate OR a Letter from a registered Accounting Officer/ Auditor OR a sworn affidavit in terms of the Amended B-BBEE Codes from Exempted Micro Enterprises (EMEs) of R10 000 000 annual turnover.
- will qualify for points for their specific goals as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.

### **Part 5: Broad Based Black Economic Empowerment Certificate**

Bidders are to submit an Original/Certified copy of a valid B-BBEE Certificate.

- A trust, consortium or joint venture will qualify for points for their specific goals as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid or a letter from an Accounting Officer/ Auditor or a sworn affidavit in terms of the Amended B-BBEE Codes for Exempted Micro Enterprises (EMEs) of R10 000 000 annual turnover.

### **Part 6: General Conditions of Contract**

Bidders must initial each page of the General Conditions of Contract and submit with their bid document.

### **Part 7: Technical approach**

Bidder must at least:

Describe, in detail, exactly how they propose to carry out the activities to achieve the outcomes identified in the terms of reference. Bidders are required to have the basic office equipment and the resource/s (which must include, laptop, internet connection, landline, own office with the basic office equipment). The bidder may be required to come on site where the work will be done. They should identify any possible problems that might hinder delivery and indicate how they will avoid or overcome such problems.

Describe how the work will be managed. Provide an entity chart clearly indicating:

- The lines of reporting and supervision within the bidder's team.

- The lines of reporting between the bidder and SHRA.

Identify the position(s) involved in the direct delivery of the service to be provided and in the overall management of the work and name the people who will fill these positions.

Describe the tasks, duties, or functions to be performed by staff in these positions.

Indicate the number of hours required to complete each task and the number of hours to be provided by each team member. The bidder must be able to work within strict timelines and have the capacity to do so.

Provide information on any additional value-added services for consideration by SHRA, and which will form part of the overall proposed solution. Please note that any additional value-added services must be priced separately in the section provided for in the pricing schedule.

Bidders are to present such information in a table format. The following is provided merely as guidance. Bidders are free to elaborate as they see fit.

<b>Outcome/ output</b>	<b>Activity</b>	<b>Team member(s) involved (name and position)</b>	<b>Person days for each team member</b>	<b>Total person days</b>

Provide a work plan of activities. In addition to providing details of the estimated number of workdays for each activity, bidders are to supply a detailed timetable that identifies when certain activities will be undertaken and over what period they will be spread. The timing of activities, the time needed to complete them, and the order in which they will be undertaken must be explained and justified.

### **Part 8: Team Details**

The bidder must provide:

- A comprehensive curricula vita (relevant to this bid and limited to two pages). In particular, the CV must highlight the team member(s) experience and qualifications to carry out the work.

### **Part 9: Experience in this field**

It is essential the service provider displays:

- Experience as set out in the terms of reference.
- The Bidder must provide at least four (4) contactable reference letters on company letterheads of previous clients where the Bidder provided similar services.

**Part 10: Bidders National Treasury Central Supplier Database (CSD) forms indicating the validity of the bidder's registration.**

**2.8 PRESENTATIONS**

2.8.1 SHRA reserves the right to invite Bidders for presentations before the award of this Bid. Only Bidders who have met the minimum functionality criteria will be invited to the presentation.

**2.9 NEGOTIATION**

2.9.1 SHRA has the right to enter negotiations with a preferred bidder regarding any terms and conditions, including price(s), of a proposed contract.

**2.10 REASONS FOR REJECTION**

2.10.1 SHRA shall reject a bid for the award of a contract if the recommended bidder has committed a proven corrupt or fraudulent act in competing for the particular contract.

2.10.2 SHRA may disregard the bid of any bidder if that bidder, or any of its directors:

2.10.2.1 have abused the Supply Chain Management systems of SHRA.

2.10.2.2 have committed proven fraud or any other improper conduct in relation to such systems.

2.10.2.3 have failed to perform on any previous contract and the proof exists.

2.10.3 Such actions shall be communicated to the National Treasury after following the blacklisting process.



### 3. TERMS OF REFERENCE

#### 3.1. INTRODUCTION AND BACKGROUND

The Social Housing Regulatory Authority (“SHRA”) is a listed Schedule 3A public entity established in terms of the Social Housing Act of 2008 and its core mandate is to invest in and regulate, the social housing sector.

The primary intention of the Social Housing Act is to deliver affordable rental housing for low to medium income groups and to achieve spatial, economic and social integration of the urban environments in South Africa.

According to Social Housing Regulation 9 (1), “the SHRA is required to conduct regular building condition inspections in order to ensure that the value of social housing stock is maintained.”

#### 3.2. PURPOSE AND OBJECTIVE

The purpose and objective of this bid is to appoint a panel of suitably qualified and experienced, service providers across all nine provinces for a period of three (3) years to undertake Building Condition Inspections (“BCIs”) of Social Housing projects identified by the SHRA.

The SHRA Building Condition Inspection (BCI) methodology “tool” used is a non-intrusive visual inspection of the following 3 components of a social housing project:

- i) Inspection of the site & grounds;
- ii) Inspection of the external envelope(s) & common areas and
- iii) Inspection of the unit's interior

Inspection form templates have been developed for these 3 components. Each template contains an overview of maintenance elements that must be inspected and prioritised.

#### **5 priority ratings are then applied ranging from:**

P1 = immediate action;

P2 = Short-term action (needs to be solved within 12 months);

P3 = Medium-term action (needs to be solved within 12 to 24 months);

P4 = Long-term action (needs to be solved within 2 to 3 years) and

P5 = Future action (needs to be solved in 3 years and beyond).

The inspection also includes the assessment of the existing Long Term Maintenance Plan (LTMP) of each SHL.

### **3.3. SCOPE OF WORK**

The appointed service providers will be required to conduct the following as part of the assignment:

- 3.3.1. Conduct comprehensive building inspections of overall buildings including common areas and exterior envelopes as per the SHRA's property management reporting templates;
- 3.3.2. To conduct the BCI on a sample determined per project/estate using guidelines provided (Handbook for Conducting Building Condition Audit)
- 3.3.3. Record all inspection data;
- 3.3.4. Assessment of reactive, turnover and long-term cyclical maintenance plans, costings, reservations and performance against predetermined indicators and Sector thresholds or benchmarks for each building;
- 3.3.5. Communicate the findings and confirm maintenance budget availability and remedial/maintenance plan with the Social Housing Landlord;
- 3.3.6. Detailed report supported by photographic evidence and detailed estimate (Bill of Quantities) for each building which covers all remedial and/or maintenance action required;
- 3.3.7. Obtain copies of building drawings specifications, recent inspections, etc. (where available) from Social Housing Landlords;
- 3.3.8. Recommendations for any improvements to the property that will, in the opinion of the consultant, decrease operating cost, significantly increase tenant comfort or improve energy efficiency – (information on scope, cost and savings should be included for these items);
- 3.3.9. The BCI must also assess the maintenance complaints management system and related performance of the Social Housing Landlords. These results must be set against the relevant regulatory criteria as set by the SH Act and Regulations and asset management good practice. The service provider is expected to further assess the effectiveness and efficiency of the maintenance

complaints management system and to build up a profile of the types of complaints, frequencies and turnover times over the past six months. Should the Social Housing Landlord not have the requisite maintenance complaints management system, the service provider should then focus on advising the SHI on how to undertake this task in order to comply with the provisions of the Social Housing Act;

3.3.10. The results must also be populated into the SHRA's property management reporting template;

3.3.11. Arrange and coordinate property access; and

3.3.12. Skills transfer to Social Housing Landlords and the SHRA.

### **3.4. PRICING**

The bidders will be required to provide pricing as and when needed. The work allocation will be on a fair and transparent basis.

### **3.5. TIME FRAMES**

The contract period for this Bid is three (3) years from the date of appointment.

### **3.6. REQUIRED LEVEL OF EXPERTISE**

The level of expertise required for this assignment can be fulfilled by a team comprising of the following multi-disciplinary:

- Civil / Structural Engineer
- Quantity Surveyor
- Mechanical Engineer
- Electrical Engineer
- Architect

3.6.1. The Bidding Company must furnish proof of at least three (3) completed Building Condition Inspections;

3.6.2. The team leader must have at least five (5) years of experience in Project Management;

3.6.3. The team leader must have a qualification in one or more of the above-mentioned disciplines;

3.6.4. The team leader must be qualified and professionally registered (additional professionals may be required to sign off the report for their relevant building elements);

3.6.5. The team member (s) must have a minimum of three (3) years of experience in undertaking Building Condition Inspections.

### 3.7. ACCOUNTABILITY AND REPORTING

The appointed service provider, as the representative of the SHRA, will be expected to consult with the Compliance Manager and Delivery Agents to execute the responsibilities on behalf of the SHRA:

### 3.8. FORMAT OF THE PROPOSAL

#### **One hard copy and its soft copy in USB format.**

The proposal of the bidder **MUST** adhere to the prescribed format:

#### **Section 1:**

- Understanding of the SHRA's mandate and challenges.
- Understanding of the required scope of work.
- Methodology as to how the scope of work will be executed.
- High level project plan as to when various activities will be scheduled and when deliverables will be produced.

#### **Section 2:**

- A detailed and comprehensive company profile.
- Project team structure, roles, and responsibilities (presented in an organogram).
- Experience of the bidder in undertaking similar projects
- Detailed and comprehensive CVs of all team members including historic work experience listed in chronological order with specified dates and all pertinent qualifications listed in chronological order with specified dates with names of institutions; and
- Reference letters - minimum of four (4) signed reference letters on the client's letterhead, indicating the duration of the project, dates, be on the client's letterhead, contact details of the client, and project description. These should show the service provider has undertaken similar assignments above (bullet point 1-3) within the past five (5) years (from the closing date of this tender.)

### 3.9. DISCLAIMER

- The SHRA has not appointed external consultants to liaise with bidders on any matter. Any matter and or queries regarding this bid will be channelled in writing through the Supply Chain Management Unit of the SHRA.
- SHRA issues this invitation for bids in good faith; however, it reserves the right to:
- Cancel or delay the selection process at any time, without explanation,

- Not to select any of the respondents to this bid invitation, without explanation,
- Exclude certain services, without explanation
- The SHRA has no tolerance for fraudulent and corrupt activities.
- Any solicitation or any attempt to solicit bribes from bidders by SHRA employees is prima facie unlawful and must be reported.
- If a bribe is paid, the SHRA will not be liable for the financial loss as no payments will be requested by any SHRA employee or committee member to ensure a successful bid outcome.
- Fraud, bribery, and corruption is unlawful and the SHRA will disqualify any bidder invited from further consideration in the tender process.
- All bidders will be informed whether they have been successful or not. A contract will only be deemed to be concluded when reduced to writing in a contract form signed by the designated responsible person of both parties. The designated responsible person of SHRA is the Chief Executive Officer or his/her written authorised delegate.

### **3.10. FUNCTIONALITY EVALUATION**

All proposals will be evaluated on the criteria provided in the table below. The proposals of all service providers will be rated on a scale of 1 to 5.

- 1: Unacceptable, does not meet set criteria
- 2: Weak, less than acceptable. Insufficient for performance requirements
- 3: Satisfactory should be adequate for stated element
- 4: Very good, above average compliance to the requirement
- 5: Exceptional mastery of the requirement should ensure extremely effective performance.

To facilitate a transparent selection process that allows equal opportunity to all Services Providers, the SHRA will adhere to its policy on the appointment of Service Providers. Bids will be evaluated in terms of the following criteria:

- Years' Experience by the Bidder on previous similar services conducted;
- Administration, management and institutional capacity to render services;
- Suitability of the proposed team, knowledge and experience of company staff;
- Proposed technical approach and Methodology to be followed and innovation;

The following table will demonstrate the criteria to be used for the allocation of points for functionality as outlined above. Bids scoring less than 70 points on functionality will be eliminated from further consideration.

Service Providers must be able to demonstrate their ability, capacity and resources to render the requested services, and proof of previous work experience by submitting a testimony letter from their previous or current clients.

#### 4. EVALUATION CRITERIA

The criteria and weights referred to and included as criteria for evaluation are as follows:

ELEMENT	FUNCTIONALITY EVALUATION: ASSESSMENT CRITERIA: RATING OF 1-5		FUNCTIONALITY WEIGHT	TOTAL SCORE
Understanding of the required scope of work <b>(5 points)</b>	1	No mention of the scope of work	<b>5%</b>	
	2	The scope of work is referred to but is inaccurate		
	3	An accurate understanding of the scope of work, written in own words		
	4	Reference to the full scope of work in own words which shows a deeper understanding over and above that contained in the terms of reference. The mandate and challenges are linked to the outcome and purpose of this bid		
	5	Reference to the full scope of work, written in own words which shows a deeper understanding over and above that contained in the terms of reference. The mandate and challenges are linked to the outcome and purpose of this bid. Examples are provided of similar work service provider has undertaken		
Propose methodology as to how the scope of work will be executed <b>(10 points)</b>	1	No methodology/approach is included	<b>10%</b>	
	2	Only a few lines or paragraphs are dedicated to methodology.		
	3	Detailed methodology and approach provided with skills transfer included that aligns with the SHRA's handbook for conducting building condition Inspections with value-added suggestions included.		
	4	Detailed methodology and approach provided with skills transfer that aligns with the SHRA's handbook for conducting building condition audits with value-added suggestions included. The project plan also includes a matrix which shows how the activities		

ELEMENT	FUNCTIONALITY EVALUATION: ASSESSMENT CRITERIA: RATING OF 1-5		FUNCTIONALITY WEIGHT	TOTAL SCORE		
		will result in specific deliverables and team members/ resources accountable for such milestones.				
	5	Detailed methodology and approach provided with skills transfer that aligns with the SHRA's handbook for conducting building condition audits with value-added suggestions. This must include the full scope of work and deliverables and a project work plan which indicates activities that adhere to the terms of reference. The project plan also includes a matrix which shows how the activities will result in specific deliverables and team members/ resources accountable for such milestones.				
<p>The team member(s) demonstrate three (3) years' experience in conducting Building Condition Inspections (BCI) (proof of experience, attach CV). <b>(15 points)</b></p>	1	Team member(s) does not have any experience in conducting BCIs	<b>15%</b>			
	2	Team member(s) has less than three (3) years' experience in conducting BCIs				
	3	Team member(s) has at least three (3) years' experience in conducting BCIs				
	4	Team member(s) has three (3) to five (5) years' experience in conducting BCIs				
	5	Team member(s) has six (6) or more years of experience in conducting BCIs				
<p>Team leader demonstrates experience in the identified disciplines (proof of experience, attach CV):</p> <ul style="list-style-type: none"> <li>The team leader must have at least five (5) years of experience in one or more of the disciplines mentioned in the Section.6 <b>(20 points)</b></li> </ul>	1	The team leader has no experience in the identified key disciplines	<b>20%</b>			
	2	The team leader has less than (5) years of experience in one or more of the disciplines mentioned in Section 6				
	3	The team leader has at least (5) years of experience in one or more of the disciplines mentioned in Section 6				
	4	The team leader has between five to eight (5-8) years of experience in one or more of the disciplines mentioned in Section 6				

ELEMENT	FUNCTIONALITY EVALUATION: ASSESSMENT CRITERIA: RATING OF 1-5		FUNCTIONALITY WEIGHT	TOTAL SCORE		
	5	The team leader has more than eight (8) years of experience in one or more of the disciplines mentioned in Section 6				
<p>Qualification of the Team Leader</p> <ul style="list-style-type: none"> <li>The team leader must have a qualification in one or more of the disciplines mentioned in the Section.6</li> <li>Professional registration in the Built Environment <b>(15 points)</b></li> </ul>	1	No submitted qualification in one or more of the disciplines mentioned in Section 6	15%			
	2	The team leader has a degree or equivalent qualification in one or more of the disciplines mentioned in Section 6				
	3	The team leader has a degree or equivalent in one or more of the disciplines mentioned in Section 6 and a professionally registered body				
	4	The team leader has a postgraduate qualification in one or more of the disciplines mentioned in Section 6 and a professionally registered body				
	5	The team leader has a master's in one or more of the disciplines mentioned in Section 6 and a professionally registered body				
<p>The team member (s) must demonstrate experience in the identified disciplines (proof of experience, attach CV):</p> <ul style="list-style-type: none"> <li>Team member (s) must have at least five (5) years' experience in one or more of the disciplines mentioned in the Section.6 <b>(15 points)</b></li> </ul>	1	None of the team members have experience in the identified disciplines	15%			
	2	Only one of the team members has three years of experience in one or more of the disciplines mentioned in Section 6				
	3	The team complement has one team member with at least five (5) years of experience in one or more of the disciplines mentioned in Section 6.				
	4	The team complement has two team members with at least five (5) years of experience in one or more of the disciplines mentioned in Section 6				
	5	The team complement has three team members with at least five (5) years of experience in one or more of the disciplines mentioned in Section 6				
	1	Bidder has not submitted any reference letter or has submitted letters that are not relevant to conducting BCIs	20%			



ELEMENT	FUNCTIONALITY EVALUATION: ASSESSMENT CRITERIA: RATING OF 1-5		FUNCTIONALITY WEIGHT	TOTAL SCORE
The Bidding Company must furnish proof of at least three (3) completed Building Condition Inspections (BCI) <b>(20 points)</b> ;	2	The bidder submitted less than three (3) contactable reference letters for conducting BCIs		
	3	The bidder submitted at least three (3) contactable reference letters for conducting BCIs		
	4	The bidder submitted four (4) contactable reference letters for conducting BCIs		
	5	The bidder submitted more than four (4) contactable reference letters for conducting BCIs		
<b>TOTAL POINTS</b>			<b>100%</b>	

## 5. EVALUATION PROCESS

### COMPLIANCE WITH MINIMUM REQUIREMENTS

All bids duly lodged will be examined to determine compliance with bidding requirements and conditions. Bids with obvious deviations from the requirements/conditions, will be eliminated from further adjudication.

### FUNCTIONALITY EVALUATION

All remaining bids will be evaluated as follows:

The functionality calculation will be done based on the defined criteria and weighting thereof. Functionality will be scored out of a 100. If it is deemed necessary, presentations may be held with Bidders who have met the minimum functionality criteria. If presentations are held, the functionality score will be adjusted whereby 80 percent will be awarded to during the bid evaluation and 20 percent will be for presentation score. **If a bidder fails to score a minimum of 70% out of 100% for functionality, the bid will be disregarded from further consideration.**

### ELIMINATION OF BIDS ON GROUNDS OF FUNCTIONALITY

Bids that score less than 70% of the 100% available for functionality will be eliminated from further consideration. Points will therefore not be awarded for their cost bids or for specific goals.

The percentage scored for functionality should be calculated as follows:

Each panel member shall award values for each individual criterion on a score sheet. The value scored for each criterion shall be multiplied with the specified weighting for the relevant criterion to obtain the marks scored for the various criteria. These marks should be added to obtain the total score. The following formula should then be used to convert the total score to a percentage for functionality:

$$Ps = \frac{So}{Ms} X Ap$$

where

Ps = percentage scored for functionality by bid/bid under consideration

So = total score of bid/bid under consideration

Ms = maximum possible score

Ap = percentage allocated for functionality

The percentages of each panel member shall be added together and divided by the number of panel members to establish the average percentage obtained by each individual bidder for functionality.

After calculation of the percentage for functionality, the prices of all bids that obtained the minimum score for functionality should be taken into consideration.

## **6. HANDBOOK FOR CONDUCTING BUILDING CONDITION AUDITS**

6.1. Refer to the attached Annexure A

### **7. PRESENTATIONS**

- a) SHRA may decide to have compulsory presentations made by Bidders who met the minimum functionality criteria once the functionality score has been calculated.
- b) Presentations shall only affect the marks awarded for functionality.
- c) If the date of the presentation meeting is not indicated in the bid document, at least three days' notice will be given to bidders required to attend a presentation.
- d) Presentations will be made to the full Evaluation Committee.
- e) Points determined by the presentation will be awarded to each bidder by each member of the Evaluation Committee and then an average calculated.

### **8. AWARDING OF PREFERENCES POINTS**

- a) Points for specific goals will be awarded according to the table indicated in the preference points claim form(s) as and when RFQs (price quotations) for specific projects to be undertaken for the different functional areas are issued to the panel.

### **9. COMBINING PRICE AND PREFERENCE POINTS**

- a) In accordance with PPPFA Act No. 5, 2000 (f), the contract must be awarded to the tenderer who scores the highest points unless objective criteria justify the award to another tenderer.
- b) The objective criteria that the SHRA intends to use is that should the price between the bidder that scores the highest points for price and specific goals and the bidder that scores highest on functionality be within 15%, the right is reserved to award to the bidder that scored the highest on functionality.

### **10. ADJUDICATION OF BID**

- a) The Adjudication Committee will consider the recommendations and make the final award. The successful bidder that will be appointed is the bidder that will meet the minimum threshold of 70% for functionality and are tax compliant as per their CSD certificates

**N/B: Bidders need to obtain a minimum of 70% for functionality to be included in the panel of service providers.**

#### **11. QUOTATION PROCESS AFTER THE AWARD OF THE PANEL**

Once the panel has been established, and appointed, a rotational system will be applicable as and when the Building Condition Inspection services will be required. When applying the rotational system, the SHRA reserves a right to prioritize and empower designated such enterprises with ownership of 51% or more by a person/s who are Women, Youth or Persons with disabilities.

#### **OBJECTIVE CRITERIA**

SHRA intends to use objective criteria, where the points difference between the bidder that scored the highest points and the second-ranked bidder is within 10%, the right is reserved to award to the bidder that scored highest on specific goals (80/20 principle).

## **SECTION B**

### **1. SPECIAL CONDITIONS OF CONTRACT**

#### **1.1. GENERAL**

- 1.1.1. Proper bids for the services specified must be submitted.

#### **1.2. ADDITIONAL INFORMATION REQUIREMENTS**

- 1.2.1. During evaluation of the bids, additional information may be requested in writing from Bidders. Replies to such request must be submitted in writing, within five (5) working days or as otherwise indicated. Failure to comply may lead to your bid being disregarded.

#### **1.3. CONFIDENTIALITY**

- 1.3.1. The bid and all information in connection therewith shall be held in strict confidence by bidders and usage of such information shall be limited to the preparation of the bid. Bidders shall undertake to limit the number of copies of this document.
- 1.3.2. All bidders are bound by a confidentiality agreement preventing the unauthorised disclosure of any information regarding the SHRA or of its activities to any other entity or individual. The bidders may not disclose any information, documentation, or products to other clients without written approval of the accounting authority or the delegate.

#### **1.4. INTELLECTUAL PROPERTY, INVENTIONS AND COPYRIGHT**

- 1.4.1. Copyright of all documentation relating to this contract belongs to the SHRA. The successful bidder may not disclose any information, documentation, or products to other clients without the written approval of the accounting authority or the delegate.
- 1.4.2. All the intellectual property (IP) rights arising from the execution of this Agreement shall vest in SHRA and the Service provider undertakes to honour such intellectual property rights and all future rights by keeping the know-how and all published and unpublished material confidential.
- 1.4.3. In the event that the service provider would like to use information or data generated by the service, the prior written permission must be obtained from SHRA.
- 1.4.4. SHRA shall own all materials produced by the Service provider during this contract, or as part of the service including without limitation, deliverables, computer programmes (source code and object code), programming aids and tools, documentation, reports, data, designs, concepts, and other information whether capable of being copyrighted or not ("IP").

1.4.5. The Service provider assigns all IP rights in respect of all materials referred to in clause 1.4.4 to SHRA. No other document needs to be executed to give effect to this cession, assignment, or transfer.

1.4.6. The Service provider hereby irrevocably cedes, assigns, and transfers to SHRA, as SHRA directs, all rights, title and interest in and to all IP (which includes but is not limited to methodologies and products) connected with or applicable to the Services.

1.4.7. The Service provider acknowledges and agrees that:

1.4.7.1. Each provision of clause 1.3 is separate, severally, and separately enforceable from any other provisions of this agreement.

1.4.7.2. The invalidity or non-enforceability of any one or more provision hereof, shall not prejudice or effect the enforceability and validity of the remaining provisions of this agreement; and

1.4.7.3. This clause 1.3 shall survive termination of this agreement.

## **1.5. NON-COMPLIANCE WITH DELIVERY TERMS**

1.5.1. As soon as it becomes known to the Service provider that he will not be able to deliver the goods/services within the delivery period and/or against the bid price and/or as specified, the SHRA must be given immediate written notice to this effect. The SHRA serves the right to implement remedies as provided for in the GCC.

## **1.6. WARRANTIES**

1.6.1 The Service provider warrants that it is able to conclude this Agreement to the satisfaction of the SHRA.

1.6.2 Although the Service provider will be entitled to provide services to persons other than SHRA, the Service provider shall not without the prior written consent of SHRA, be involved in any manner whatsoever, directly, or indirectly, in any business or venture which competes or conflicts with the obligations of the Service provider to provide the Services.

## **1.7. PARTIES NOT AFFECTED BY WAIVER OR BREACHES**

1.7.1 The waiver (whether express or implied) by any Party of any breach of the terms or conditions of this contract by the other Party shall not prejudice any remedy of the waiving party in respect of any continuing or other breach of the terms and conditions hereof.

1.7.2 No favour, delay, relaxation, or indulgence on the part of any Party in exercising any power or right conferred on such Party in terms of this contract shall operate as a waiver of such power or right nor shall any single or partial exercise of any such power or right under this agreement.

## 1.8.RETENTION

- 1.8.1. On termination of this agreement, the Service provider shall on demand hand over all documentation, information, software, etc., relating to the provision of services as per this bid without the right of retention, to the SHRA.
- 1.8.2. No agreement to amend or vary a contract or order or the conditions, stipulations or provisions thereof shall be valid and of any force and effect 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.

## 2. GENERAL CONDITIONS OF CONTRACT

- 2.1 The General Conditions of Contract must be accepted. The general conditions applicable to government entity bids, contracts and order are attached herein as **Annexure B** as they will apply to this bidding process.
- 2.2 Bidders are required to initial each page of the General Conditions of Contract as an indication of acceptance.

## INVITATION TO SUBMIT BIDS

**YOU ARE HEREBY INVITED TO PROPOSE FOR REQUIREMENTS OF THE SHRA**

**RFB NUMBER:** SHRA/RFB/CAR/01/202425 **CLOSING DATE:** 04 November 2024

**CLOSING TIME:** 11h00

**DESCRIPTION:** The appointment of a panel of service providers to conduct Building Condition Inspections (BCI) for a period of three (3) years

**VALIDITY PERIOD:** Proposal to be valid for 120 days from the closing date of the bid.

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

**BID DOCUMENT MUST BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)**

Ms Dziphathutshedzo Nevari  
Supply Chain Management  
SHRA  
Sunnyside Office Park  
3<sup>rd</sup> Floor, Sentinel House  
32 Princess of Wales Terrace  
Parktown

Faxed or e-mailed bids will not be accepted.

**Bidders should ensure that bids are delivered timeously to the correct address. If the bid is late, it will not be accepted for consideration.**

**Bids can be delivered between 08h30 and 16h30, Mondays to Friday, prior to the closing date and between 08h30 and 11h00 on the closing date.**

**All bids must be submitted on the official forms (not to be re-typed).**

**This RFB is subject to the following:**

- General Conditions of Contract (GCC) and, if applicable, any other Special Conditions of Contract.
- the Preferential Procurement Policy Framework Act, 2000
- the Preferential Policy Regulations, 2022
- Bids submitted that do not comply with the following will be disqualified
- A late Bid (a bid arriving one second after 11h00 or any time thereafter)



## PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)					
BID NUMBER:	SHRA/RFB/CAR/01/202425	CLOSING DATE:	04 November 2024	CLOSING TIME:	11h00
DESCRIPTION	The appointment of a panel of service providers to conduct Building Condition Inspections (BCI) for a period of three (3) years				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
SHRA, Sunnyside Office Park, Sentinel House, 3 <sup>rd</sup> Floor, 32 Princess of Wales Terrace, Parktown					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON			CONTACT PERSON		
TELEPHONE NUMBER			TELEPHONE NUMBER		
E-MAIL ADDRESS			E-MAIL ADDRESS		
SUPPLIER INFORMATION					
NAME OF BIDDER					
NAME OF REPRESENTATIVE					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		<b>OR</b>	CENTRAL SUPPLIER DATABASE No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX]  <input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	[TICK APPLICABLE BOX]  <input type="checkbox"/> Yes <input type="checkbox"/> 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?	<input type="checkbox"/> Yes <input type="checkbox"/> No  [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No  [IF YES, ANSWER PART B:3 ]	
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS					
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?				<input type="checkbox"/> YES	<input type="checkbox"/> NO
DOES THE ENTITY HAVE A BRANCH IN THE RSA?				<input type="checkbox"/> YES	<input type="checkbox"/> NO
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?				<input type="checkbox"/> YES	<input type="checkbox"/> NO
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?				<input type="checkbox"/> YES	<input type="checkbox"/> NO
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?				<input type="checkbox"/> YES	<input type="checkbox"/> NO
<b>IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.</b>					

RFB: The appointment of a panel of service providers to conduct Building Condition Inspections (BCI) for a period of three (3) years

**PART B**

**SBD 1**

**TERMS AND CONDITIONS FOR BIDDING**

<b>1. BID SUBMISSION:</b>
1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
1.2. <b>ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.</b>
1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
1.4. <b>THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).</b>
<b>2. TAX COMPLIANCE REQUIREMENTS</b>
2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
2.6 WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

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

**TOTAL BID PRICE (ALL INCLUSIVE) .....**

**SIGNATURE OF BIDDER:**  
.....

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

**DATE:**  
.....

**BIDDER’S DISCLOSURE**

**1. PURPOSE OF THE FORM**

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

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

**2. Bidder’s declaration**

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

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

Full Name	Identity Number	Name of State institution

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

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

2.2.1 If so, furnish particulars:

.....  
.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract?

**YES/NO**

2.3.1 If so, furnish particulars:

.....  
.....

**3 DECLARATION**

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

- 3.1 I have read and I understand the contents of this disclosure.
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect.
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement, or arrangement with any competitor. However, communication between partners in a joint venture or consortium<sup>2</sup> will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

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

3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

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

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

..... Signature	..... Date
..... Position	..... Name of bidder

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

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

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

### 1. GENERAL CONDITIONS

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

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

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

(a) The applicable preference point system for this tender is the 80/20 preference point system.

(b) The 80/20 preference point system will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

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

(c) Price; and

(d) Specific Goals.

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

The maximum points for this tender are allocated as follows:

	<b>POINTS</b>
<b>PRICE</b>	<b>80</b>
<b>SPECIFIC GOALS</b>	<b>20</b>
<b>TOTAL POINTS FOR PRICE AND SPECIFIC GOALS</b>	<b>100</b>

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

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

### 2. DEFINITIONS

**“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations,

competitive tendering process or any other method envisaged in legislation.

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

### 3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

#### 3.1. POINTS AWARDED FOR PRICE

##### 3.1.1 THE 80/20 PREFERENCE POINT SYSTEMS

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

**80/20**

$$P_s = 80 \left( 1 - \frac{P_t - P_{min}}{P_{min}} \right)$$

Where

- P<sub>s</sub> = Points scored for price of tender under consideration
- P<sub>t</sub> = Price of tender under consideration
- P<sub>min</sub> = Price of lowest acceptable tender

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

##### 3.2.1. POINTS AWARDED FOR PRICE

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

**80/20**

$$P_s = 80 \left( 1 + \frac{P_t - P_{max}}{P_{max}} \right)$$

Where

- P<sub>s</sub> = Points scored for price of tender under consideration
- P<sub>t</sub> = Price of tender under consideration
- P<sub>max</sub> = Price of highest acceptable tender

### 4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points

based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:

- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
- (a) an invitation for tender for income-generating contracts, that either the 80/20 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
  - (b) any other invitation for tender, that either the 80/20 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system, then the organ of state must indicate the points allocated for specific goals for 80/20 preference point system.

**Table 1: Specific goals for the tender and points claimed are indicated per the table below.**

***(Note to organs of state: Where 80/20 preference point system is applicable, corresponding points must also be indicated as such.)***

***Note to tenderers: The tenderer must indicate how they claim points for each preference point system and provide supporting evidence.***

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Enterprises with ownership of 51% or more by a person/s who are Women	10	
Enterprises with ownership of 51% or more by a person/s who are Youth / People Living with Disabilities	10	
<b>Total Points Allocated to Specific Goals</b>	<b>20</b>	

#### DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name \_\_\_\_\_ of  
company/firm.....

4.4. Company \_\_\_\_\_ registration \_\_\_\_\_ number: \_\_\_\_\_

4.5. TYPE OF COMPANY/ FIRM

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



Y State Owned Company  
[TICK APPLICABLE BOX]

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

..... <b>SIGNATURE(S) OF TENDERER(S)</b>	
<b>SURNAME AND NAME:</b>	.....
<b>DATE:</b>	.....
<b>ADDRESS:</b>	.....
	.....
	.....
	.....

**BIDDERS ARE ENCOURAGED TO USE THE FOLLOWING CHECKLIST WHEN SUBMITTING THEIR BIDS:**

DETAILS	TICK BY BIDDER
Part 1: Completed and signed the invitation to bid document (SBD 1)	
Part 3: Completed and signed the declaration of interest document. <i>(SBD 4). (In case of a consortium/ joint venture, or where sub-Service providers are utilised, each party to the bid <u>must</u> complete and sign the declaration of interest document)</i>	
Part 4: Completed and signed the Preference Points Claim form in terms of the Preferential Procurement Regulations 2022 (SBD 6.1)	
Part 5: Submitted an original/ certified copy of a valid BBEE Certificate. <i>(In case of a trust, consortium or joint venture, bidders will qualify for points for their specific goals as an unincorporated entity, provided that the entity <u>submits their consolidated B-BBEE scorecard</u> as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.</i>	
Part 6: Submitted the General Conditions of Contract (initialled each page)	
Part 7: Submitted the Technical approach	
Part 8: Submitted the Details of the team and included their CV	
Part 9: Submitted Experience in the field document and 4 reference letters	
Part 10: Bidders National Treasury Central Supplier Database (CSD) forms indicating the validity of the bidder's registration.	
CIPC Document	