



## Invitation to Quote

YOU ARE HEREBY INVITED TO QUOTE FOR REQUIREMENTS LISTED IN THIS DOCUMENT

**Quote Number NRF/SAIAB 24-2023**

### **SHORT DESCRIPTION OF REQUIREMENT**

Provision of Mechanical Consulting Engineering Services for the replacement and maintenance of ventilation, building management system (BMS) and air conditioning system at SAIAB

## INVITATION TO QUOTE (SBD 1A)

Quote Number	NRF/SAIAB 24-2023
Closing Date and Time (as per NRF systems)	21 October 2022 at 11:00

### HIGH LEVEL SUMMARY OF REQUIREMENTS

Provision of Mechanical Consulting Engineering Services for the replacement and maintenance of ventilation, building management system (BMS) and air conditioning systems at SAIAB.

### RESPONSE DOCUMENTS ARE DELIVERED TO:

#### EMAIL DELIVERY AS FOLLOWS:

Quotations can be delivered by email before the closing date and time to: [bids@saiab.nrf.ac.za](mailto:bids@saiab.nrf.ac.za)

ONLY PDF DOCUMENTS ARE ACCEPTABLE

**Bidding procedure enquiries may be directed in writing to:**

**Technical information may be directed in writing to:**

Section	SCM	Section	Technical
Contact person	Mr Nkosi Khuzwayo	Contact person	Francois Lamont
E-mail address	<a href="mailto:NC.Khuzwayo@saiab.nrf.ac.za">NC.Khuzwayo@saiab.nrf.ac.za</a>	E-mail address	<a href="mailto:FE.Lamont@saiab.nrf.ac.za">FE.Lamont@saiab.nrf.ac.za</a>

## SUPPLIER INFORMATION

**Name Of Bidder**

**Postal Address**

**Street Address**

**Telephone Number**

Code

Number

**Cell Phone Number**

Code

Number

**Facsimile Number**

Code

Number

**E-Mail Address**

**VAT Registration Number**

**Tax Compliance Status**

Tax Compliance System PIN

**OR**

Central Supplier Database No.

MAAA

**B-BBEE Status Level Verification Certificate**

Tick Applicable Box.

☐ Yes ☐ No

**B-BBEE Status Level Sworn Affidavit**

Tick Applicable Box.

☐ Yes ☐ No

**[A B-BBEE status level verification certificate/ sworn affidavit (for EMEs & QSEs) must be submitted in order to qualify for preference points for B-BBEE]**

**Are you the accredited representative in South Africa for the goods /services/works offered?**

☐ Yes ☐ No  
If yes enclose proof

**Are you a foreign-based supplier for the goods/services/ works offered?**

☐ Yes ☐ No  
If yes, answer the questionnaire below

### 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

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.

## TERMS AND CONDITIONS FOR BIDDING (SBD 1B)

### 1. BID SUBMISSION:

1.1	Bids must be delivered by the stipulated time to the correct address. Late bids will not be accepted for consideration.
1.2	All bids must be submitted on the official forms provided–(not to be re-typed) or in the manner prescribed in the bid document. Bid pages are bound to minimise risk of lost pages.
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) with its special conditions of contract, and, if applicable, any other legislative requirements.
1.4	The successful bidder will be required to fill in and sign a written contract form (SBD7).

### 2. TAX COMPLIANCE REQUIREMENTS

2.1	Bidders must ensure compliance with their tax obligations.
2.2	Bidders are required to submit their unique personal identification number (PIN) issued by SARS to enable the organ of state to 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 <a href="http://www.sars.gov.za">www.sars.gov.za</a> .
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.

### 3. VALIDITY PERIOD FROM DATE OF CLOSURE

60 days

### 4. BRIEFING SESSION DETAILS

<b>Attendance:</b>	Onsite Meeting
<b>Date and Time:</b>	13 October 2022 at 11:30
<b>Venue:</b>	SAIAB
<b>Address:</b>	Somerset Street Grahamstown
<b>Contact Person:</b>	Francois Lamont

### 5. THE BIDDING SELECTION PROCESS

<p><b><u>Stage 1 – Compliance to submission requirements</u></b></p> <p>Bidders warrant that their proposal document has, as a minimum; the specified documents required for evaluating their proposals as set out in the Returnable Document List and conform to all the terms, conditions, and specifications as set out in this document.</p>
<p><b><u>Stage 2 – Evaluation of Bids against Technical Specifications</u></b></p> <p><b>Bidders achieving the minimum threshold in the specification to enter the Price/Preference scoring stage:</b></p>
<p><b><u>Stage 2A – Evaluation of Bids against Specifications including Quality</u></b></p> <p>The NRF evaluates each bidder's written response to the specifications issued in accordance to published evaluation criteria set out in this document.</p>
<p><b><u>Stage 2B – Due Diligence Interviews or Proof of Delivery/Concept against Specifications</u></b></p> <p>Where circumstances justifies it, the NRF conducts interviews with shortlisted bidders for them to present further</p>

## TERMS AND CONDITIONS FOR BIDDING (SBD 1B)

information or provide further proof to the evaluation committee. In these cases, the National Research Foundation provides the areas of concern to the short listed bidders to address in their presentations with this document and, where necessary, may provide further areas of concern to the short listed bidders at this stage.

### Stage 2C – Due Diligence Research

The National Research Foundation confirms the recommended bidder(s)'s reference letters with referees to confirm the recommendation(s).

### Stage 3 – Price/Preference Evaluation

#### Basis of fair competition:

The NRF compares each bidder's pricing proposal on an equal and fair comparison basis equitable to all bidders, taking into account all aspects of the bid's pricing requirements including the application of fair pricing tests as set out below in the section "Insufficiency of Funds".

#### Ranking of the bidders pricing:

The NRF ranks the qualifying bids on price with lowest priced Bid receiving the maximum points (either 80 or 90) and the remainder ranked in relation to the lowest priced bid. The NRF adds the bidders' claimed preference points as verified to the submitted preference claim form (SBD 6.1) to provide the final ranking for the award decision.

### Stage 4 – Checking Tax Compliance

#### Stage 4A – Taxpayers Resident in South Africa

The NRF notifies the recommended bidder in writing where their tax compliance check reflects that they are non-compliant and provides the recommended bidder seven (7) working days to submit written proof from SARS of their tax compliance status or proof that they have made an arrangement with SARS to meet their outstanding tax obligations. Failure to deliver such written evidence of compliance results in the rejection of that recommended bid.

#### Stage 4B – Non-Resident Foreign Bidders

Where foreign bidders are submitting a bid, they complete all sections of the SBD1 especially the tax questionnaire. The NRF submit the Foreign Bidder's completed SBD1 to the South African Revenue Service to obtain from the South African Revenue Service the Confirmation of Tax Obligations letter. Where South Africa Revenue Services does not issue the letter, Stage 4A applies in clearing the reason for not receiving the letter.

### Stage 5 – Award and Contract Signing

The NRF nominates the bidder with the highest combined score for the contract award subject to the bidder having supplied the relevant administrative documentation.

## **6. ACKNOWLEDGEMENT OF READING EACH PAGE**

The bidder warrants by signature in this document that the bidder has read and accepts each page.

## **7. CENTRAL SUPPLIER DATABASE REGISTRATION**

Bidders are requested to register on the Central Supplier Database and to include in their bid their Master Registration Number (Supplier Number) in order to enable the NRF to verify the supplier's tax status on the Central Supplier Database.

## **8. CLARIFICATION**

If the respondent wishes to clarify aspects of this request or the acquisition process, they contact the officials listed under the enquiries section above. The National Research Foundation does not provide the origin of the request to any party.

## **9. RESPONSE PREPARATION COSTS**

The NRF is not liable for any costs incurred by a bidder in the process of responding to this Bid Invitation, including on-site presentations.

## **10. COLLUSION, FRAUD AND CORRUPTION**

Any effort by Bidder/s to influence evaluation, comparisons, or award decisions in any manner will result in the rejection and disqualification of the bidder concerned.

### 11. FRONTING

The NRF, in ensuring that bidders conduct themselves in an honest manner will, as part of the bid evaluation processes where applicable, conduct or initiate the necessary enquiries/investigations to determine the accuracy of the representation made in the bid documents. The onus is on the bidder to prove that fronting does not exist, should the National Research Foundation establish and notify the bidder of potential breaches of any of the fronting indicators as contained in the Department of Trade and Industry's "Guidelines on Complex Structures and Transactions and Fronting". Failure to do so within a period of 7 days from date of notification will invalidate the bid/contract and may also result in the restriction of the bidder to conduct business with the public sector for a period not exceeding 10 years, in addition to any other remedies the NRF may have against the bidder concerned.

### 12. DISCLAIMERS

The NRF has produced this document in good faith. The NRF, its agents, and its employees and associates do not warrant its accuracy or completeness. The NRF makes no representation, warranty, assurance, guarantee or endorsements to any provider/bidder concerning the document, whether with regard to its accuracy, completeness or otherwise and the NRF shall have no liability towards the responding service providers or any other party in connection therewith.

### 13. CANCELLATION OF THE QUOTATION PRIOR TO AWARD

**Procurement not required:** The NRF cancels the Bid Invitation prior to making an award if due to changed circumstances there is no need for the specified procurement in the document.

**No Acceptable Quotations:** The NRF cancels the Quotation Invitation prior to making an award if it receives no acceptable bids i.e. that do not meet the minimum requirements set out in this document.

**Invalid Bid Procedure:** The NRF cancels the Quotation Invitation prior to making an award if a material irregularity occurred in the bid process.

**Insufficiency of Funds at date of Award:** The NRF cancels the Quotation Invitation prior to making an award if the funds are no longer available to cover the total estimated contract value at the date of the evaluation.

**Quoted Prices are within a fair price range:** The NRF cancels the Quotation Invitation where the offered price is defective as being too low or too high to the identified fair price range. The NRF conducts fair pricing tests to arrive at an opinion of reasonableness of the offer price. Where these tests reflect pricing outside of the established fair price range, the evaluators may recommend price negotiation and no other component. The NRF starts negotiation with the winning bidder or, where that bidder refuses negotiation, with the next ranked bidder in the price/preference ranking until a market related price is achieved.

## SBD 1 SIGNATURE

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

**SIGNATURE OF BIDDER:**

**CAPACITY UNDER WHICH THIS BID IS SIGNED**

(Proof of authority must be submitted e.g. company resolution)

**DATE:**

## SCOPE OF WORK

### INTRODUCTION TO THE NRF

The National Research Foundation Act, Act 23 of 1998, establishes the National Research Foundation ("NRF") as the juristic person that makes this bid invitation and will contract with the awarded bidder. The Public Finance Management Act classifies the organisation as a Schedule 3A Public Entity.

The NRF is the government's national agency responsible for promoting and supporting research and human capital development through funding, the provision of National Research Facilities and science outreach platforms and programs to the broader community in all fields of science and technology, including natural science, engineering, social science and humanities.

The **South African Institute for Aquatic Biodiversity (SAIAB)**, based in Makhanda formerly known as Grahamstown, Eastern Cape, is a **National Research Facility of the National Research Foundation**, a public entity, established in terms of the National Research Foundation Act No. 23 of 1998. SAIAB is an internationally recognised centre for the study of aquatic biodiversity.

### CONTEXT OF THIS PROCUREMENT

The South African Institute for Aquatic Biodiversity intends to appoint a Mechanical Consulting Engineering company for the replacement of current ventilation and air conditioning system in the Collections building, at their premises in Somerset Street, Grahamstown.

### CONTRACT PERIOD

The contract period for this bid contract is three (3) years.

### DETAILED SPECIFICATION

The scope of work shall be based on the project requirements and the latest Engineering Council Board Notice 138 of 2015: Guidelines for Services and Processes for Estimating Fees for Persons Registered in terms of the Engineering Profession Act, 2000 (Act No. 46 of 2000) as published in Government Gazette No.39480 dated 4 December 2015. The following exceptions to the above shall apply:

- a) Planning, studies, investigations and assessments (paragraph 3.1) relating to Mechanical work shall form part of Normal Services and be included in stage 1 & 2.
- b) This bid is for Professional Mechanical Engineering consultancy services for HVAC systems.

The appointed Mechanical Engineering consultant will be required to perform the following duties:

- Planning, Studies, Investigations and Assessments
- Inception
- Concept and Viability (also termed Preliminary Design)
- Design Development (also termed Detail Design)
- Documentation and Procurement
- Contract Administration and Inspection
- Close-Out

#### General

The professional Service provider will execute the required services in a professional manner, complying with the appropriate designs and specifications. They will comply with all relevant legislation pertaining to the built environment in general.



Service	Scope of work
Mechanical Engineering consulting services	<p>The Mechanical Engineering consulting services shall satisfy the stated objectives of the Employer in relation to the construction works identified in the description of the services.</p> <p>The consultancy shall, as a minimum, in order to satisfy these objectives, provide the standard services as set out in the Engineering Council Board Notice 138 of 2015: Guidelines for Services and Processes for Estimating Fees for Persons Registered in terms of the Engineering Profession Act (Act 46 of 2000) as published in Government Gazette 39480 dated 4 December 2015 including items shown in the schedule of prices.</p>

## SCOPE OF PROFESSIONAL SERVICES REQUIRED

### 1. ENDORSEMENTS AND REGISTRATION

Consultants to be registered with the Engineering Council of South Africa

### 2. DUTIES

In addition to the duties as described in the latest Board Notice 138 of 2015 Engineering Council: Guidelines for Services and Processes for Estimating Fees for Persons Registered in terms of the Engineering Profession Act, 2000 (46 of 2000) as published in Government Gazette 39480 dated 4 December 2015 with applied exceptions, the consulting engineers shall also perform the following duties:

#### 2.1 GENERAL

- a) Ensure all activities comply with all relevant government Acts and Norms
- b) Timeous and proper reporting via the Project Manager
- c) Coordination with local authorities according to the relevant local by-laws throughout the entire project stages, where applicable.
- d) Ascertain full involvement of local stakeholders (communities, organisations, etc.) at all times as related to Mechanical Engineering matters
- e) Seek the necessary ratifications at all times from all stakeholders
- f) Ensure quality control of physical elements and intangible processes

## DRAWINGS ATTACHED AS ANNEXURES

See Annexure A for drawings.



## SETS OF QUOTATION DOCUMENTS REQUIRED

**Number of ORIGINAL bid documents for contract signing**

1

Bidders must submit the above number of original documents to SAIAB or by email in PDF format. These serve as the original sets for the legal bid document and, upon award and signature, the legal contract document between the bidder and the NRF. (Where only one set is requested, this remains with the NRF). The bidders attach the originals or certified copies of any certificates stipulated in this document to these original sets of bid documents..

## RETURNABLE DOCUMENTS REQUIRED

The bidder is to complete this table and to supply the necessary page references to the supporting documentation. **A bidder failing to adequately provide any of the mandatory documents is automatically disqualified.**

**Legislative/Technical Documents**

**Compliance**

(M – Mandatory); (O – Optional)	Submitted	Bid Section Reference	Reference to Bidder's document
<b><u>Bidder Eligibility</u></b>			
Procurement Invitation (SBD 1), signed and completed.	<b>M</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	Page 6
Bidder Disclosure (SBD 4), signed and completed.	<b>M</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	Page 19
Preference Points Claimed (SBD 6.1), signed and completed.	<b>M</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	Page 22
Tax compliance status of foreign suppliers with tax obligations in South Africa.	<b>M</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	Page 3
<b><u>Selection Criteria</u></b>			
The bidder must have at least one director (as indicated on the Company Registration document / CSD) who is registered with and has an active status with Engineering Council of South Africa (ECSA) as a Professional Engineer. Attach copies of valid Professional Registration certificates of a director(s). The verification of professional registration status will also be done online.	<b>M</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	Page 26
Bidder must have a minimum of 10 years' experience in the Engineering industry (company registration documents and/or Company Profile)	<b>M</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	Page 27
Bidder must have office/s located in the Eastern Cape (provide latest Municipal Account Statement or Lease Agreement as proof)	<b>M</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	Page 28
Record of projects: current and past submitted.	<b>M</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	Page 29 & 30
Project References – at least 3 for Mechanical Engineering submitted.	<b>M</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	Page 32
Details of the Project Team and CV with Qualifications & Proof of Professional Registration are submitted. At least one member of the Project Team must be registered with ECSA as Professional Engineer with a Mechanical Engineering Degree.	<b>M</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	Page 31
<b><u>Price Offered Documents</u></b>			
Pricing (SBD 3) in this document to be completed.	<b>M</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	Page 12
Detailed pricing schedules and supporting documents	<b>O</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	

## PRE-QUALIFICATION ELIGIBILITY CRITERIA

### LOCAL CONTENT AS SPECIAL CONDITION OF CONTRACT

Legislative local content	Not Applicable
NRF specific local content	Not Applicable

### ECONOMIC EMPOWERMENT AS SPECIAL CONDITION OF CONTRACT

Pre-Qualifying Criteria	A minimum B-BBEE status level	Not Applicable
Pre-Qualifying Criteria	An exempted micro enterprise (EME) or qualifying small enterprise (QSE)	Not Applicable
Pre-Qualifying Criteria	At least 51% owned by black people	Not Applicable
Pre-Qualifying Criteria	At least 30% owned by black women	Not Applicable

**A bidder failing to meet any of the stipulated pre-qualifying criteria is automatically disqualified.**

## ELIGIBILITY CRITERIA (GO/NO-GO)

Selection Element		Meet Specification Minimum	Bid Section Reference	Reference to Bidder's document
1	Fully completed Procurement Invitation (SBD 1) including all documents in the Bidder Eligibility section, and signed Bid Submission Certificate form.	<input type="checkbox"/> YES <input type="checkbox"/> NO	Returnable Documents' Bidder Eligibility section on page 9	
2	Active status with Engineering Council of South Africa (ECSA)	<input type="checkbox"/> YES <input type="checkbox"/> NO	Certification	
3	Minimum of ten years' experience in the Engineering industry	<input type="checkbox"/> YES <input type="checkbox"/> NO	Company registration documents and/or Company Profile	
4	Offices in Eastern Cape	<input type="checkbox"/> YES <input type="checkbox"/> NO	Municipal Account Statement or Lease Agreement	
5	Record of projects	<input type="checkbox"/> YES <input type="checkbox"/> NO	Current and past submitted	
6	Safety Letter of good standing Safety file	<input type="checkbox"/> YES <input type="checkbox"/> NO	Copies of certificates	
7	Evaluation of references	<input type="checkbox"/> YES <input type="checkbox"/> NO	Returnable Documents' Due diligence of Eligibility on page 9	

Selection Element		Meet Specification Minimum	Bid Section Reference	Reference to Bidder's document
8	Project Team	<input type="checkbox"/> YES <input type="checkbox"/> NO	Project Team and CV with Qualifications & Proof of Professional Registration	

## SBD 3.1: PRICING DETAIL

### Pricing Special Conditions

1	<b><u>Pricing Schedule:</u></b> Guideline Scope of Services and Tariff of Fees for Persons Registered in terms of the Engineering Profession Act # 2000# (Act No.46 of 2000 – Govt Gazette Vol 606 of 4 Dec 2015. No. 39480 commencement 01 January 2016):
2	<b><u>Price quoted</u></b> is South African Rands
3	<b><u>Price Basis</u></b> Price quoted is fully inclusive of all costs including delivery to the specified NRF price delivery point and includes value-added tax, income tax, unemployment insurance fund contributions, and skills development levies.
4	<b><u>Price Delivery Point:</u></b> In cases where different delivery points influence the pricing, the bidder submits a separate pricing schedule for each delivery point.  Delivery points are: SAIAB Somerset Street Makhandla, 6139
5	<b><u>Application of Preference Points:</u></b> Pricing is subject to the addition of Preference Points as stipulated below - Standard Bidding Document 6.1 Preference claim form.

### PRICING SCHEDULE

BIDDERS TO NOT ALTER ANY FIGURES GIVEN IN THIS SCHEDULE. IF ONE WISHES TO OFFER ALTERNATIVES, THE ALTERNATIVES MUST BE GIVEN IN A SEPARATE SUBMISSION.

### Mechanical Engineering Services

For the purposes of this project, the current budget for the Works is estimated based on the cost of recently completed Works of a similar nature. The final cost will, however, depend on the strategy selected by the Employer based on the most appropriate and cost-effective options identified by the Service Provider during the project assessment and preliminary design phases. The Service Provider shall note that no adjustments to any tendered rates will be applicable irrespective of the actual final cost of the project.

The estimated costs of the different project components, with an anticipated commencement date of January 2023, are provided below (excluding contingencies, CPA during the construction period and VAT):

Estimated Cost of Works:		R1 000 000
Calculated Fee:		R_____
Discount Offered:	_____%	R_____
Discounted Fee Amount:		R_____

(Discounted Fee to be carried to Final Summary)

**TABLE 1: IDENTIFICATION OF WORK**

Service Category	% Fee	Amount (Calculated on Discounted Fee)
<b>Stage 1: Inception</b> Establish client's requirements and preferences, refine user needs and options, establish the project brief including project objectives, priorities, constraints, assumption aspirations and strategies.	5	
<b>Stage 2: Concept and Viability (also termed Preliminary design).</b> Prepare and finalise the project concept in accordance with the brief, including project scope, scale, character, form and function, plus preliminary programme and viability of the project.	15	
<b>Stage 3: Design development (also termed Detail Design).</b> Develop the approved concept to finalise the design, outline specifications, cost plan, financial viability and programme for the project.	20	
<b>Stage 4: Documentation and Procurement.</b> Prepare procurement and construction documentation, confirm and implement the procurement strategies and procedures for effective and timeous procurement of necessary resources for execution of the project.	20	
<b>Stage 5: Contract Administration and Inspection</b> Manage, administer and monitor the construction contracts and processes including preparation and coordination of procedures and documentation to facilitate practical completion of the works.	35	
<b>Stage 6: Close-Out</b> Fulfil and complete the project close-out including necessary documentation to facilitate effective completion, handover and operation of the project.	5	
<b>Total</b>	<b>100</b>	

**TABLE 2: TIME RELATED COSTS**

Name of person	Task and responsibility	Time	Rate	Amount
<b>Total</b>				

**TABLE 3: PRINTING, COPIES AND BINDING**

Description	Pages	Rate	Amount
Typing and Printing			
Duplication			
A1 Drawing Copies			
A0 Drawing Copies			
<b>Total</b>			

**TABLE 4: TRAVELLING EXPENSES**

\*Distance to be calculated from Engineer's place of practice to SAIAB.

\*Flights and accommodation cost are to be according to the latest National Treasury instruction related to travel and subsistence.

Purpose	Number of meetings	Vehicle	Rate	Distance in Km's	Amount
Design meetings	4				
Site Hand-over meeting	1				
Progress Meetings	5				
Inspections	5				
Technical Meetings	5				
Practical Completion	1				
Works Completion	1				
Final Completion	1				
<b>Total</b>					

**TABLE 5: SUBSISTENCE AND OTHER EXPENSES**

Description and Individual responsible	Rate	No.	Amount
<b>Total</b>			

**TABLE 6: SUMMARY OF DISBURSEMENTS**

<b>PRINTING, COPIES AND BINDING (Table 3 total)</b>	
<b>TRAVELLING EXPENSES (Table 4 total)</b>	
<b>SUBSISTENCE &amp; OTHER EXPENSES (Table 5 total)</b>	
<b>Total (To be carried to Final Summary)</b>	

<b>FINAL SUMMARY OF PRICING DETAIL</b>	
<b>Description</b>	<b>Amount</b>
Fee Amount (Total from Table 1)	
Time related cost (Total from Table 2)	
Disbursements (Total from Table 6)	
Subtotal	
Vat (15% Value Added Tax)	
<b>Total Contract Amount</b>	



## GENERAL CONDITIONS OF CONTRACT

The Standard Conditions of Contract for Professional Services as published and amended from time to time by the Construction Industry Development Board, are applicable to this contract. Copies of these conditions of contract may be obtained from the Construction Industry Development Board's website [www.cidb.org.za](http://www.cidb.org.za)

## SPECIAL CONDITIONS OF CONTRACT

- 1 **Implementation Planning and Project Management:** The contracted provider will arrange an initial meeting to determine delivery execution with the assigned NRF project team. Both parties will review the proposed project execution plan submitted with the bid and agree on the finalised timetable stating clearing commence date and completion date of each stage of the implementation.
- 2 **Performance verification:** The NRF appointed contract manager or agent verifies that the performance of this contract in terms of services, delivery service, goods, labour and any other element specified in this contract is at the contracted performance level and/or the goods meet the contracted specifications with the represented of the contracted provider. Both parties verify this through signing the verification documentation. Both parties, at this time, agree on quantity, unit cost and total value on the same signed document.
- 3 **Software Maintenance Service:** The contracted provider, during any paid software maintenance service term, provides software maintenance service for the licensed program(s) which consist of delivering subsequent releases of the program, if any; exerting reasonable efforts to both (a) provide, within a reasonable time, workarounds for any material programming errors in the current release of the program that are directly attributable to the contract provider, and (b) correct such errors in the next available release, provided the NRF provides the contract provider with sufficient information to identify the errors. The NRF, during the same paid software maintenance service term, is entitled to receive technical support for the current release. Technical support means assistance by telephone, fax, electronic mail, and any digital communication methods with the installation and/or use of the then-current release of the licensed program, including all available bug fixes and patches, and their interaction with the supported hardware and operating systems ("Platforms").
- 4 **Contracted Party Due Diligence:** The NRF has the right to conduct supply chain due diligence including site visits and inspections at any time during the contract period.
- 5 **Communication:** The contracted parties communicate in writing through mail, delivery, or email. The contracted party states the contract number and purchase order number, if the latter is applicable, on communication documentation. The contract party does not act upon any communication without the contract number or must verify such communication with the assigned NRF contract manager prior to acting upon it.
- 6 **Occupational Health and Safety when working on NRF sites:** All personnel performing work on NRF site/s as part of this contract are responsible to obtain safety induction.  
  
Over and above the obligations provided by the Occupational Health and Safety Act (OHS Act No 85 of 1993 and its Regulations, known as 'the Act'), the contracted party meets with all relevant health and safety instructions as given to them by site safety personnel, where relevant. Personal protection equipment including closed safety shoes, hard hats, height safety equipment, and high visibility vests are worn at all times while on the work site. All personnel are to obey the relevant instructions, including signage, related to restricted access and speed limits on all sites.  
  
The contracted party, once signing the contract (SBD 7), is responsible for itself, its employees, and those people affected by its operations in terms of the Act the regulations promulgated in terms thereof. The contracted party performs all work and uses equipment on site complying with the provisions of the Act.  
  
To this end, the contracted party shall make available to the NRF on the valid Letter of Good Standing in terms of the COID

## GENERAL CONDITIONS OF CONTRACT

Act and ensures its validity does not expire while executing this bid, where applicable. The contracted party furnishes its registration number with the office of the Compensation Commissioner. The contracted party enters into a Section 37.2 agreement in terms of Occupational Health and Safety Act (OHS Act No 85 of 1993 and its Regulations) that the NRF drafts.

The contracted party maintains a health and safety plan complying with the requirements of The Act at the work site during the period that contracted work takes place on the site.

The NRF manages the contracted party in his capacity for the execution of this contract to meet the provisions of the said Act and the regulations promulgated in terms thereof. The contracted party accepts liability for any contraventions to the Act. Each member of the contracted party's team (including sub-contracted personnel), submit a signed indemnity form prior to entering the work site and kept in the contracted party's health and safety file.

## MANAGEMENT OF PERFORMANCE LEVELS

1. The Performance Levels are in the table below.
2. The NRF measures the contracted bidder's performance against these in the execution of the contract.
3. The contracted bidder recognises that its failure to meet the performance levels has material adverse impact on the operations of NRF and that the damage from the contracted bidder's failure to meet any performance level is not susceptible to precise determination.
4. The NRF excuses the contracted bidder from failing to comply with the performance levels to the extent that non-performance or delayed performance is solely and directly attributable to an act or omission of the NRF or its staff or circumstances of force majeure as referred to in this Agreement.
5. If the contracted bidder fails to meet any performance level:
  - a) The contracted bidder shall investigate and report on the root causes of the performance level failure;
  - b) Promptly correct the failure and begin meeting the set performance levels;
  - c) Advise the NRF as and to the extent requested by the NRF of the status of remedial efforts being undertaken with respect to such performance level failure; and
  - d) Take preventive measures to prevent the recurrence of the performance level failure.
6. Both parties are responsible for monitoring and measuring the performance of the contracted bidder against the performance levels set in this document. The NRF deems failure by the contracted bidder to measure performance with respect the contract specifications for any measurement period as a failure to meet the stipulated performance levels.

## PERFORMANCE LEVELS STATEMENT

## PERFORMANCE LEVELS STATEMENT

<b>Service/Goods being Measured</b>	<b>Measurement Methodology</b>	<b>Penalty/Bonus and level applicable from</b>
Professionalism	Deadlines are met on time	Recorded against performance
Documentation ( Floor plans, reports, COC's)	All documentation(digital and hard copies) is submitted to the institute	Recorded against performance
Onsite inspection and monitoring	Minimum of five (5) onsite inspections	Recorded against performance
Provide technical criteria and assistance for appointment of Contractor.	Attendance of BSC meetings and procurement documentation	Recorded against performance

## SBD 4 - BIDDER DISCLOSURE

### 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

<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.

## SBD 4 - BIDDER DISCLOSURE

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

<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.

#### SBD 4 - BIDDER DISCLOSURE

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.

- 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 CLAIMED (SBD 6.1)

**Preference points claim form for broad-based black economic empowerment (B-BBEE) status level of contribution in terms of the preferential procurement regulations 2017**

**NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS, AND DIRECTIVES APPLICABLE IN RESPECT OF B-BBEE, AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017.**

### 1. GENERAL CONDITIONS

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

1.1.1. the 80/20 system for requirements with a Rand value of up to R 50 000 000 (all applicable taxes included); and

1.1.2. The 90/10 system for requirements with a Rand value above R 50 000 000 (all applicable taxes included)

1.2. Points for this bid shall be awarded for:

1.2.1. Price; and

1.2.2. B-BBEE Status Level of Contributor

The maximum points for this bid are allocated as follows:	POINTS
PRICE	80
B-BBEE STATUS LEVEL OF CONTRIBUTION	20
<b>Total points for Price and B-BBEE must not exceed</b>	<b>100</b>

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

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

### 2. DEFINITIONS

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

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

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

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

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

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

**"prices"** includes all applicable taxes less all unconditional discounts;

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

1. B-BBEE Status level certificate issued by an authorized body or person;
2. A sworn affidavit as prescribed by the B-BBEE Codes of Good Practice;
3. Any other requirement prescribed in terms of the B-BBEE Act;

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

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



## PREFERENCE POINTS CLAIMED (SBD 6.1)

### 3. POINTS AWARDED FOR PRICE

#### THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

A maximum of 80 or 90 points is allocated for price on the following basis:

80/20

or

90/10

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

or

$$P_s = 90 \left( 1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

Where

$P_s$  = Points scored for price of bid under consideration

$P_t$  = Price of bid under consideration

$P_{\min}$  = Price of lowest acceptable bid

### 4. POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR

In terms of Regulation 6 (2) and 7 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

B-BBEE Status Level of Contributor	Number of points (90/10 system)	Number of points (80/20 system)
1	10	20
2	9	18
3	6	14
4	5	12
5	4	8
6	3	6
7	2	4
8	1	2
Non-compliant contributor	0	0

### 5. BID DECLARATION

Bidders who claim points in respect of B-BBEE Status Level of Contribution must complete the following:

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

B-BBEE Status Level of Contributor:= .....(maximum of 10 or 20 points)

(Points claimed in respect of paragraph 6.1 must be in accordance with the table reflected in paragraph 4.1 and must be substantiated by relevant proof of B-BBEE status level of contributor.

#### SUB-CONTRACTING

Will any portion of the contract be sub-contracted?

(Tick applicable box)

YES		NO	
-----	--	----	--

If yes, indicate:

1. What percentage of the contract will be subcontracted.....%

2. The name of the sub-contractor.....

3. The B-BBEE status level of the sub-contractor.....

## PREFERENCE POINTS CLAIMED (SBD 6.1)

4. Whether the sub-contractor is an EME or QSE

(Tick applicable box)

YES		NO	
-----	--	----	--

Specify, by ticking the appropriate box, if subcontracting with an enterprise in terms of Preferential Procurement Regulations, 2017:

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

### DECLARATION WITH REGARD TO COMPANY/FIRM

Name of company/firm: .....

VAT registration number: .....

Company registration number:.....

#### TYPE OF COMPANY/ FIRM

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

[TICK APPLICABLE BOX]

#### DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

.....

.....

.....

#### COMPANY CLASSIFICATION

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

[TICK APPLICABLE BOX]

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

## PREFERENCE POINTS CLAIMED (SBD 6.1)

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

1. The information furnished is true and correct;
2. The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
3. In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 6.1, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;
4. If the B-BBEE status level of contributor has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –
  - (a) disqualify the person from the bidding process;
  - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
  - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
  - (d) recommend that the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury from obtaining business from any organ of state for a period not exceeding 10 years, after the Audi alteram partem (hear the other side) rule has been applied; and
  - (e) Forward the matter for criminal prosecution.

## PROFESSIONAL REGISTRATION OF DIRECTOR/S

(The Bidder is requested to furnish the following particulars and to attach additional pages if more space is required. Failure to furnish the particulars may result in the Bid being disregarded.)

Directors Name and Surname	Highest Qualification (Attach copies)	Professional Registration No. (Attach proof)

## **COMPANY REGISTRATION DOCUMENTS AND/OR COMPANY PROFILE**

The Bidder is requested to furnish Company registration documents and/or Company Profile. Failure to furnish the particulars may result in the Bid being disregarded.

**OFFICE LOCATION:**

The bidder to provide latest Municipal Account Statement or Lease Agreement as proof. Failure to furnish the particulars may result in the Bid being disregarded.

**RELEVANT PROJECT EXPERIENCE – COMPLETED PROJECTS**

Failure to furnish the particulars may result in the Bid being disregarded.

NO.	NAME OF PROJECT.	NAME OF CLIENT.	CONTACT DETAILS OF CLIENT.	PROJECT VALUE	DATE COMPLETED
1					
2					
3					
4					
5					
6					
7					
8					
9					



## RELEVANT PROJECT EXPERIENCE – CURRENT PROJECTS

Failure to furnish the particulars may result in the Bid being disregarded.

NO.	NAME OF PROJECT.	NAME OF CLIENT.	CONTACT DETAILS OF CLIENT.	PROJECT VALUE	STAGE OF PROJECT
1					
2					
3					
4					
5					
6					
7					
8					
9					

## PROJECT TEAM

WORK CAPACITY: (The Bidder is requested to furnish the following capacity particulars and to attach additional pages if more space is required).

**CVs and copies of qualifications of the below Project Team members are to be attached.**

Failure to furnish the particulars may result in the Bid being disregarded.

Name and Surname	Highest Qualification	Professional Registration No.	Years of Experience

## REFERENCE LETTER FORMAT

### Referee Letterhead

**Referee Legal Name:**

**REFERENCE ON COMPANY:**

**Bid Number:**

NRF/SAIAB 24-2023

**Bid Description** Provision of Mechanical Consulting Engineering Services for the replacement and maintenance of ventilation, building management system (BMS) and air conditioning system at SAIAB

Describe the service/work the above bidder provide to you below

Criteria / risks	Below requirements	Meets requirements	Exceeds requirements
Professionalism			
Completion times			
Satisfaction with work done			
Availability of spares			
Technology up to date			
Management of costs			
Project management			
Overall Impression	Other comments		
Approximate value of contract			
Would you use the provider again?			<input type="checkbox"/> YES <input type="checkbox"/> NO

**Completed by:**

**Signature:**

**Company Name:**

**Contact Telephone Number:**

**Date:**

## BID SUBMISSION CERTIFICATE FORM - (SBD 1)

I hereby undertake to supply all or any of the goods, works, and services described in this procurement invitation to the NRF in accordance with the requirements and specifications stipulated in this Bid Invitation document at the price/s quoted.

My offer remains binding upon me and open for acceptance by the NRF during the validity period indicated and calculated from the closing time of Bid Invitation.

The following documents are deemed to form and be read and construed as part of this offer / bid even where integrated in this document:

Invitation to Bid (SBD 1)	Specification(s) set out in this Quotation Invitation inclusive of any annexures thereto
Bidder's responses to this invitation as attached to this document	Pricing Schedule(s) (SBD3) including detailed schedules attached
Local Content and Local Manufacturing Certification (SBD 6.2) in accordance with the SABS standard	
Bidder Disclosure (SBD 4)	
Preference (SBD 6.1) claims for Broad Based Black Economic Empowerment Status Level of Contribution in terms of the Preferential Procurement Regulations 2017, supported by a valid certified BBBEE certificate.	
General Conditions of Contract and special/additional conditions of contract as set out in this document	

I confirm that I have satisfied myself as to the correctness and validity of my offer / bid in response to this Bid Invitation; that the price(s) and rate(s) quoted cover all the goods, works and services specified in the Bid Invitation and cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.

I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me in terms of this Bid Invitation as the principal liable for the due fulfilment of the subsequent contract if awarded to me.

I declare that I have had no participation in any collusive practices with any Bidder or any other person regarding this or any other Bid.

I certify that the information furnished in these declarations (SBD 3, SBD 4, SBD 6.1, SBD 6.2 (if applicable)) is correct and I accept that the NRF may reject the Bid or act against me should these declarations prove to be false.

I confirm that I am duly authorised to sign this offer/ bid response.

<b>NAME (PRINT)</b>	
CAPACITY	
SIGNATURE	
<b>WITNESS 1</b>	
NAME	

**BID SUBMISSION CERTIFICATE FORM - (SBD 1)**

SIGNATURE

**WITNESS 2**

NAME

SIGNATURE

DATE

Annexure A: Drawings



