



## REQUEST FOR QUOTATION (RFQ)

RFQ NUMBER: REQ NHFC 007925

REQUEST FOR QUOTATION (RFQ) FOR: MARKET RESEARCH FOR PROPERTY ON ERF 2262  
NORKEM PARK, EXTENSION 2, KEMPTON PARK, EKURHULENI, BENONI, GAUTENG

## **RFQ DOCUMENTS CHECK LIST:**

The contents of the RFQ document must be as follows, and numbered as per the numbering below, with each schedule punched, placed in a file and separated from the next schedule with a file divider. Please complete the checklist below to verify your submission of the relevant documents:

<b>Schedules</b>	<b>Description</b>	<b>Submitted – Indicate YES or NO</b>
Annexure 1	Tax Compliance Status Pin	
Annexure 2	Copies of Company Registration Documents	
Annexure 3	Copy of Valid B-BBEE certificate or Sworn Affidavit.	
Annexure 4	Current Central Supplier Database Report Copy	
Annexure 5	SBD 1: Invitation to Bid	
Annexure 6	Pricing Schedule	
Annexure 7	SBD 4: Bidder's Disclosure	
Annexure 8	SBD 6.1: Preference Point Claim Form in Terms of Preferential Procurement Regulations 2022	
Annexure 9	Identity Document of Directors	

## SECTION 1

### SBD 1 INVITATION TO BID

<b>YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE NHFC SOC LTD.</b>					
BID NUMBER:	REQ NHFC 007925	CLOSING DATE:	15 February 2024	CLOSING TIME:	11:00am
DESCRIPTION	REQUEST FOR QUOTATION FOR MARKET RESEARCH FOR PROPERTY ON ERF 2262 NORKEM PARK, EXTENSION 2, KEMPTON PARK, EKURHULENI, BENONI, GAUTENG				
BID RESPONSE DOCUMENTS MAY BE EMAILED TO:					
<b>Quotations04@nhfc.co.za</b>					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Ms Anda Mazibuko		CONTACT PERSON		
TELEPHONE NUMBER	N/A		TELEPHONE NUMBER		
FACSIMILE NUMBER	N/A		FACSIMILE NUMBER		
E-MAIL ADDRESS	<b>Quotations04@nhfc.co.za</b>		E-MAIL ADDRESS		
SUPPLIER INFORMATION					
NAME OF BIDDER					
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:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	[TICK APPLICABLE BOX]		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		[TICK APPLICABLE BOX]
	Yes	No		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	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)? YES  NO

DOES THE ENTITY HAVE A BRANCH IN THE RSA? YES   
NO

DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?

YES  NO

DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?

YES  NO

IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? YES  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

### 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.
- 1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
- 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 [WWW.SARS.GOV.ZA](http://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 PIN 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.

SIGNATURE OF BIDDER: .....

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

## SECTION 2

### NOTICE TO BIDDERS

#### 1. RESPONSES TO RFQ

Responses to this RFQ [Quotations] must not include documents or reference relating to any other quotation or proposal. Any additional conditions must be embodied in an accompanying letter.

Proposals must reach NHFC before the closing hour on the date shown on SBD1 above, and must be e- mailed to Ms **Anda Mazibuko**

**Email address:** [quotations04@nhfc.co.za](mailto:quotations04@nhfc.co.za)

#### 2. PREQUALIFICATION / ELIGIBILITY CRITERIA

2.1 Only those Bidders who satisfy the following pre-qualification or eligibility criteria are eligible to submit quotations as per section 3.

#### 3 COMMUNICATION

Bidder/s are warned that a response will be liable for disqualification should any attempt be made either directly or indirectly to canvass any SCM Officer(s) or NHFC employee in respect of this RFQ between the closing date and the date of the award of the business.

#### 4 LEGAL COMPLIANCE

The successful Bidder shall be in full and complete compliance with any and all applicable national and local laws and regulations.

#### 5 CHANGES TO QUOTATIONS

Changes by the Bidder to its submission will not be considered after the closing date and time.

#### 6 PRICING

All prices must be quoted in South African Rand on a fixed price basis, including VAT if applicable.

#### 7 BINDING OFFER

Any Quotation furnished pursuant to this Request shall be deemed to be an offer. Any exceptions to this statement must be clearly and specifically indicated.

#### 8 RFQ Conditions

- This RFQ is subject to the Preferential Procurement Policy Framework Act 2000, the Preferential Procurement Regulations, 2022, the general conditions of contract (GCC) and, if applicable, any other legislation or special conditions of contract.
- The lowest or any bid will not necessarily be accepted.
- NHFC reserves the right to reject submitted proposal if deemed necessary. Should it be

discovered by the NHFC that the bidder did not act in good faith and/or has declared incorrectly/falsely, NHFC reserves the right to disqualify or reject the bid.

- The NHFC reserves the right to disqualify a bid proposal if the bidders' proposal is not compliant with the scope of work/terms of reference.
- The bidder is subjected to due-diligence process which includes, screening, vetting, and/or any best practice necessary for the NHFC to comply with legislation and its Policies and Procedures. Due diligence and PEP checks will also be conducted on the successful bidder.
- The NHFC reserves the right to disqualify a bid if the bidder fails to provide reasonable request (s) for documentation/information which the NHFC deems necessary for the purpose of evaluation within reasonable timelines this includes the set deadline per request,
- Bid rigging/collusive behaviour by the bidder will result in disqualification. A bidder is not permitted to submit proposal from more than one registered company with a common director/shareholder.
- The NHFC deems the Bidder has read and accepted the General Conditions of Contract.
- Bidders must submit the bid a soft copy of the RFQ via email. The soft copy serves as the legal bid contract document and the master record between the bidder and the NHFC.
- The NHFC undertakes to pay out within 30 days from issuance of substantiated invoices issued in terms of this appointment (Payment schedule as defined in the service level agreement). No payment will be made on outstanding information not submitted by the service provider. Service provider must maintain an updated tax compliant status for the during of the contract.
- The cost of compiling a Proposal is and remains the prospective service provider's own cost and will not be paid for by NHFC.
- The successful bidder (s) will be required to sign a Service Level Agreement (SLA), in terms of which the service provider's performance will be measured and managed.
- NHFC has zero tolerance for reputational harm. The bidder hereby gives consent to the NHFC to conduct background checks on the bidding entity and any of its directors / partners / trustees / shareholders /members/employees. The NHFC reserves the right to consider the information arising from such background check as part of the tender evaluation process.
- The NHFC reserves the right to reject submitted proposal(s) if it discovers that the bidder (or its directors/members) has any serious adverse reports, whether confirmed by a court or not, such as:
  - Being cited as aiding and abetting state capture,
  - Involvement in fraud and / or corrupt activities;
  - Misrepresenting audit outcomes of an organisation;

- Listed on the National Treasury restricted database;
- Being under investigation or facing allegations that may result in criminal charges; or
- Any report as a result of which the NHFC may suffer reputational harm in any way by doing business with the bidder.

## **9 NATIONAL TREASURY'S CENTRAL SUPPLIER DATABASE**

Bidders are required to self-register on National Treasury's Central Supplier Database (CSD) which has been established to centrally administer supplier information for all organs of state and facilitate the verification of certain key supplier information. NHFC is required to ensure that price quotations are invited and accepted from prospective bidders listed on the CSD. Business may not be awarded to a bidder who has failed to

register on the CSD. Only foreign suppliers with no local registered entity need not register on the CSD. The CSD can be accessed at <https://secure.csd.gov.za>.

## **10 PROTECTION OF PERSONAL DATA**

In responding to this RFQ, NHFC acknowledges that it may obtain and have access to personal data of the Bidders. NHFC agrees that it shall only process the information disclosed by Bidders in their response to this bid for the purpose of evaluating and subsequent award of business and in accordance with any applicable law.

Furthermore, NHFC will not otherwise modify, amend or alter any personal data submitted by Bidders or disclose or permit the disclosure of any personal data to any Third Party without the prior written consent from the Bidders. Similarly, NHFC requires Bidders to process any personal information disclosed by NHFC in the bidding process in the same manner.

## **11 EVALUATION METHODOLOGY**

NHFC will utilise the evaluation criteria indicated in this document criteria in choosing a Supplier/Service Provider,;

## **12 ADMINISTRATIVE RESPONSIVENESS**

The test for administrative responsiveness will include completeness of response and whether all returnable and/or required documents, certificates; verify completeness of warranties and other RFQ requirements and formalities have been complied with. Incomplete Bids will be disqualified.

## **13 VALIDITY PERIOD**

NHFC requires a validity period of 60 Business Days from the closing date.

Bidders are to note that they may be requested to extend the validity period of their response, on the same terms and conditions, if the internal processes are not finalized within the validity period. However, once the adjudication body has approved the process and award of the business to the successful Bidder(s), the validity of the successful Bidder(s)' response will be deemed to remain valid until a final contract has been concluded.

## **14 RETURNABLE DOCUMENTS**

**Returnable Documents** means all the documents, Sections and Annexures, as listed in the tables below. There are three types of returnable documents as indicated below and Bidders are urged to ensure that these documents are returned with the quotation based on the consequences of non-submission as indicated below:

## **15 Mandatory Returnable Documents**

Failure to provide all these Mandatory Returnable Documents at the Closing Date and time of this RFQ will result in a Bidder's disqualification. Bidders are therefore urged to ensure that all these Documents are returned with their Quotations.

## SECTION 3

### 17. EVALUATION CRITERIA:

**Stage1:** Adherence to Mandatory documents

**NB:** Compliance Checklist Requirements for all Services/Goods and works

If you do not submit the following mandatory documents your Proposal/Quote will be disqualified automatically:

No.	Description of requirement
a)	
b)	
c)	
d)	
e)	
f)	
g)	

**Stage 2:** The following documents are non-mandatory and where not submitted, NHFC may request the documents and must be made available at the time of request from the most responsive bidder:

No.	Description of requirement
a)	Company Registration Documents
b)	Copies of Directors' ID documents;
c)	Valid BBBEE Certificate from a SANAS accredited rating agency (Original or Certified) or affidavit signed by the Commissioner of Oath
d)	Valid Tax Pin
e)	CSD report / CSD reference number
i)	SBD 1: Invitation to Bid
f)	Pricing Schedule
g)	SBD 4: Bidders disclosure

h)	SBD 6.1. Preference Point Claim Form	
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### Stage 3- Price and Preferences

1	Price	80 points	
2	Specific Goals	20 points	
#	Specific Goal	Proof	Points Allocation
1	South African citizen who had no franchise in national elections prior to the introduction of the Constitution of the Republic of South Africa, 1983 (Act 200 of 1983) or the Constitution of the Republic of South Africa, 1996. (Minimum >50% ownership or more)	<ul style="list-style-type: none"> <li>• Company Registration Certification (CIPC)</li> <li>• Certified identification documentation of company director/s</li> <li>• CSD report/ CSD registration number (MAAA number)</li> </ul>	7
2	Woman Ownership >50%	<ul style="list-style-type: none"> <li>• Company Registration Certification (CIPC)</li> <li>• Certified identification documentation of company director/s</li> <li>• CSD report/ CSD registration number (MAAA number)</li> </ul>	8
3	Disabled Ownership >50%	<ul style="list-style-type: none"> <li>• Company Registration Certification (CIPC)</li> <li>• Certified identification documentation of company director/s</li> <li>• CSD report/ CSD registration number (MAAA number)</li> <li>• Certified medical certificate from a registered medical practitioner</li> </ul>	1
4	Military veteran Ownership >50%	<ul style="list-style-type: none"> <li>• Company Registration Certification (CIPC)</li> <li>• Certified identification documentation of company director/s</li> <li>• CSD report/ CSD registration number (MAAA number)</li> <li>• A verifiable letter from an authorised body/entity certifying the military status of the claimant (bidder).</li> </ul>	1
5	Youth Ownership >50%	<ul style="list-style-type: none"> <li>• Company Registration Certification (CIPC)</li> <li>• Certified identification documentation of company director/s</li> <li>• CSD report/ CSD registration number (MAAA number)</li> </ul>	3

## SECTION 4

### NHFC GENERAL CONDITIONS OF PURCHASE

#### **General**

NHFC and the Supplier enter into an order/contract on these conditions to supply the items (goods/services/works) as described in the order/contract.

#### **Conditions**

These conditions form the basis of the contract between NHFC and the Supplier. Notwithstanding anything to the contrary in any document issued or sent by the Supplier, these conditions apply except as expressly agreed in writing by NHFC.

No servant or agent of NHFC has authority to vary these conditions orally. These general conditions of purchase are subject to such further special conditions as may be prescribed in writing by NHFC in the order/contract.

#### **Local Content Obligations**

Bidders are to note that the Local Content commitments made by the successful Bidder(s) will be incorporated as a term of the contract and monitored for compliance. Should the successful Bidder fail to meet its Local obligations, non-compliance penalties shall be applicable. Breach of Local Content obligations also provide NHFC cause to terminate the contract in certain cases where material non-compliance with Local Content requirements are not achieved.

#### **Price and payment**

The price or rates for the items stated in the order/contract may include an amount for price adjustment, which is calculated in accordance with the formula stated in the order/contract.

The Supplier may be paid in one currency other than South African Rand. Only one exchange rate is used to convert from this currency to South African Rand. Payment to the Supplier in this currency other than South African Rand, does not exceed the amounts stated in the order/contract. NHFC pays for the item within 30 days of receipt of the Suppliers correct tax invoice.

#### **Delivery and documents**

The Supplier's obligation is to deliver the items on or before the date stated in the order/contract. Late deliveries or late completion of the items may be subject to a penalty if this is imposed in the order/contract. No payment is made if the Supplier does not provide the item as stated in order/contract.

Where items are to be delivered the Supplier:

Clearly marks the outside of each consignment or package with the Supplier's name and full details of the destination in accordance with the order and includes a packing note stating the contents thereof; On dispatch of each consignment, sends to NHFC at the address for delivery of the items, an advice note specifying the means of transport, weight, number of volume as appropriate and the point and date of dispatch; Sends to NHFC a detailed priced invoice as soon as is reasonably practical after dispatch of the items, and states on all communications in respect of the order the order number and code number (if any).

### **Containers / packing material**

Unless otherwise stated in the order/contract, no payment is made for containers or packing materials or return to the Supplier.

### **Title and risk**

Without prejudice to rights of rejection under these conditions, title to and risk in the items passes to NHFC when accepted by NHFC.

### **Rejection**

If the Supplier fails to comply with his obligations under the order/contract, NHFC may reject any part of the items by giving written notice to the Supplier specifying the reason for rejection and whether and within what period replacement of items or re-work are required.

In the case of items delivered, NHFC may return the rejected items to the Supplier at the Supplier's risk and expense. Any money paid to the Supplier in respect of the items not replaced within the time required, together with the costs of returning rejected items to the Supplier and obtaining replacement items from a third party, are paid by the Supplier to NHFC.

In the case of service, the Supplier corrects non-conformances as indicated by NHFC.

### **Warranty**

Without prejudice to any other rights of NHFC under these conditions, the Supplier warrants that the items are in accordance with NHFC's requirements, and fit for the purpose for which they are intended, and will remain free from defects for a period of one year (unless another period is stated in the Order) from acceptance of the items by NHFC.

### **Indemnity**

The Supplier indemnifies NHFC against all actions, suits, claims, demands, costs, charges and expenses arising in connection therewith arising from the negligence, infringement of intellectual or legal rights or breach of statutory duty of the Supplier, his subcontractors, agents or servants, or from the Supplier's defective design, materials or workmanship.

The Supplier indemnifies NHFC against claims, proceedings, compensation and costs payable arising out of infringement by the Supplier of the rights of others, except an infringement which arose out of the use by the Supplier of things provided by NHFC.

### **Assignment and sub-contracting**

The Supplier may not assign or subcontract any part of this order/contract without the written consent of NHFC.

### **Termination**

NHFC may terminate the order/contract at any time (without prejudice to any right of action or remedy which has accrued or thereafter accrues to NHFC):

If the Supplier defaults in due performance of the order/contract, or if the Supplier becomes bankrupt or otherwise is, in the opinion of NHFC, in such financial circumstances as to prejudice the proper performance of the order/contract, or for any other reason in which case the Supplier will be compensated for all costs incurred.

### **Governing law**

The order/contract is governed by the law of the Republic of South Africa and the parties hereby submit to the non-exclusive jurisdiction of the South African courts.

## SECTION 5

SBD 4

### RETURNABLE DOCUMENTS

#### 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

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**

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

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

If so, furnish particulars:

.....  
.....

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**

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 consortium2 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.
- 3.5 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.
- 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

## SECTION 6

**SBD 6.1**

### **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:
- 1.2 the 80/20 system for requirements with a Rand value up to R50 000 000 (all applicable taxes included); and
- 1.3 **To be completed by the organ of state**  
*(delete whichever is not applicable for this tender).*
  - a) The applicable preference point system for this tender is the **80/20** preference point system.
- 1.4 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.
- 1.5 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:
  - (a) Price; and
  - (b) Specific Goals.

#### **1.6 To be completed by the organ of state:**

The maximum points for this tender are allocated as follows:

	<b>POINTS</b>
PRICE	80
SPECIFIC GOALS	20
<b>Total points for Price and SPECIFIC GOALS</b>	<b>100</b>

- 1.7 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.

1.8 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

2.1 “**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;

2.2 “**price**” means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;

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

2.4 “**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

(a) “**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

$$PPPP = 8888 \frac{11 - \frac{PPPP - PP \text{ mmmmm}}{PP \text{ mmmmm}}}{11}$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = 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:

80/10

$$PPPP = 8888 \diamond 11 + \frac{PPPP - PP \text{ mmmmmmm}}{PP \text{ mmmmmmm}} \diamond$$

Where

Ps = Points scored for price of tender under consideration  
 Pt = Price of tender under consideration  
 Pmax = 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 or 90/10 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 or 90/10 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 or 90/10 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 both the 80/20 or 90/10 preference point system.

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

**Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)**

The specific goals allocated points in terms of this tender	Supporting evidence for meeting preferential procurement targets (bidder to provide the below supporting evidence to claim allocated points for each specific goal)	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)
South African citizen who had no franchise in national elections prior to the introduction of the Constitution of the Republic of South Africa, 1983 (Act 200 of 1983) or the Constitution of the Republic of South Africa, 1996. (Minimum >50% ownership or	<ul style="list-style-type: none"> <li>• Company Registration Certification (CIPC)</li> <li>• Certified identification documentation of company director/s</li> <li>• CSD report/ CSD registration number (MAAA number)</li> </ul>	7	

more)			
Woman Ownership >50%	<ul style="list-style-type: none"> <li>• Company Registration Certification (CIPC)</li> <li>• Certified identification documentation of company director/s</li> <li>• CSD report/ CSD registration number (MAAA number)</li> </ul>	8	
Disabled Ownership >50%	<ul style="list-style-type: none"> <li>• Company Registration Certification (CIPC)</li> <li>• Certified identification documentation of company director/s</li> <li>• CSD report/ CSD registration number (MAAA number)</li> <li>• Certified medical certificate from a registered medical practitioner</li> </ul>	1	
Military veteran Ownership >50%	<ul style="list-style-type: none"> <li>• Company Registration Certification (CIPC)</li> <li>• Certified identification documentation of company director/s</li> <li>• CSD report/ CSD registration number (MAAA number)</li> <li>• A verifiable letter from an authorised body/entity certifying the military status of the claimant (bidder).</li> </ul>	1	
Youth Ownership >50%	<ul style="list-style-type: none"> <li>• Company Registration Certification (CIPC)</li> <li>• Certified identification documentation of company director/s</li> <li>• CSD report/ CSD registration number (MAAA number)</li> </ul>	3	

#### **DECLARATION WITH REGARD TO COMPANY/FIRM**

4.1. Name of company/firm.....

4.2. Company registration number: .....

4.3. TYPE OF COMPANY/ FIRM

Partnership/Joint Venture / Consortium

- One-person business/sole proprietor
- Close corporation
- Public Company
- Personal Liability Company
- (Pty) Limited
- Non-Profit Company
- State Owned Company

[TICK APPLICABLE BOX]

4.4. 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;

4.5. The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;

4.6. 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;

4.7. 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>	..... ..... .....

## SECTION 7

### SPECIFICATIONS

#### MARKET RESEARCH FOR PROPERTY ON ERF 2262 NORKEM PARK, EXTENSION 2, KEMPTON PARK, EKURHULENI, BENONI, GAUTENG

## 1. INTRODUCTION

The National Housing Finance Corporation (NHFC) was established by the National Department of Human Settlements as a development finance institution (DFI) in 1996, with the principle mandate of broadening access to affordable housing finance for the low and middle income households.

NHFC is a national public entity, therefore adheres to the regulatory framework of the Public Finance Management Act (PFMA) of 1999.

The NHFC provides wholesale funding in the affordable housing market mainly to social housing institutions, non-banking retail intermediaries, privately owned property developers, construction companies and investors. It also provides loans and other forms of wholesale funding (equity and quasi equity) to certain niche businesses that are in the affordable housing market.

## 2. BACKGROUND

NHFC wishes to appoint a service provider to carry out a project specific independent market study for one of its funded developments in Norkem Park, Kempton Park, Johannesburg.

The NHFC through its Board and Credit Investment Committee approved a loan facility of R 88 139 966, in September 2019 (including facility fee of R 881 399.66 plus an estimated capitalized interest of R 16 120 625) for the development and construction of 222 private rental units in Norkem Park, Kempton Park. The development is 100% black female owned and contributes positively towards lending activities to designated groups.

## 3. SUBJECT PROPERTY DESCRIPTION

The property can be described as follows:

- The property is situated at Erf 2262 Norkem Park Extension 2, Kempton Park, Ekurhuleni, Benoni, Gauteng Province.
- The subject property is under construction, with units completion at different levels.
- The property measures 2, 3 hectares.
- Currently zoned as Res 4.

## 4. ASSIGNMENT OBJECTIVES

- a. To establish rental affordability levels in the area where the subject property is located
- b. Establish market demand for affordable rentals in the area
- c. To establish the affordable rental supply in the area and
- d. To establish the monthly take-up applicable to the subject property.

## 5. SCOPE OF WORK

The purpose of the assignment is to conduct an independent project specific market study to review and assess the location area for the successful take-up of the 222 affordable rental units under development at an average monthly rental of R 6 383.

Duties include but not limited to the following:

**5.1** Undertake a thorough market assessment on the area where the subject property is located.

**5.2** Undertake a demand study for affordable rental housing in the subject location and area with the objective to answer the following questions question:

- 5.2.1 What is the demand and affordability for affordable rental housing in this area?.
- 5.2.2 What are the rentals in the target area.
- 5.2.3 What is the anticipated take-up for rental units in the area?
- 5.2.4 Is there demand to justify the average rental of R6 383 per unit in the area.

**5.3** Compile a comprehensive report with findings, conclusion and recommendations that include the following:

- **Location delineation** defining clearly the area of coverage and rationale e.g. looking at what modes of transport, education and health amenities exist and are planned for the target area;
- **Location analysis** define what the total need for housing is, what is the size of a private rental housing portfolio vs other housing responses, how is the current housing response segmented e.g. what is the percentage of informal vs formal settlements, subsidized vs privately funded, ownership vs rental, what is the land need to address current and future private rental housing needs vs the available feasible land;
- **Economic Profiling.** What is the size of regional economies, what in these are the dominant

contributors, what are the current and future forecast growth and performance patterns of the various segments of these economies;

- **Demographic Market overview** –housing market area delineation and population size, household sizes, age profile, racial profile, levels of education, employment status and what is the split of occupations in which sectors, what are people choosing for dwelling types and tenure status, annual household incomes, living standard measurement, level of indebtedness and affordability, dominant household expenditure patterns, what percentage across all these aspects represents the affordable private rental housing target market in relations to other tenure options;
- **Residential Market Analysis** – South Africa affordable housing overview, local residential market activity in the surrounding areas, residential demand modelling, what is an overview of the residential market trends underlining the source market area.
- **Private Rental sector analysis** – size of the existing portfolio, what is the size of the planned and approved developments, what are the occupancy vs vacancy rates, what are the average vacancy filling turnaround times, what are the unit types and sizes for which the market is most lucrative.
- **General Risks** – for example rent boycotts, political risk, legislative risks, which may have an impact on demand. Show what is the best approach to mitigate such risks.
- **Findings, Recommendations and conclusion**

## 6. PROJECT DELIVERABLES AND TIMEFRAME

1. Draft comprehensive report (electronic) to be submitted within 2-3 weeks from the appointment letter issue date; and
2. The final report incorporating feedback from the draft report to be submitted (hard copy and electronic) – no later than 5 weeks from the appointment letter issue date.

## 7. KEY COMPETENCIES OF SERVICE PROVIDER

The service provider will be required to demonstrate the following knowledge, skills and experience:

- a) The Bidder or Team leader must have a minimum of five (5) years' experience in Research, knowledge of research approaches and methodologies, data analysis for demand studies;

- b) Team member/s or team leader must have a minimum of three (3) years' experience in conducting research studies within the human settlements sector,
- c) Bidders and or team leader has done three or more comprehensive similar assignments / projects successfully in the past. Service Providers are required to submit at least three (3) reference letters of similar assignments done previously as set out in these specifications indicating the scope, scale and the date of the assignments; track record of successful implementation; demonstrate technical expertise; suitability to the assignment. **The letters must be signed and dated.**

## 8. CONSTRAINTS AND ASSUMPTIONS

- a. The service provider must be able to do field visits for the purpose of executing this contract.
- b. As part of this contract the service provider must be prepared to work with the various stakeholders (Complex Managers, Tenants, Property Management Companies who will give input and/or feedback to the process. It is therefore the responsibility of the service provider to ensure that parties are informed and are available for inputs and or participation in the various pieces of work that pertains to elements of this contract.
- c. The service provider will prepare budget outline as part of the proposal showing anticipated expenditure for this project implementation.
- d. The service provider will also be required to document and keep record of engagements with the various parties and build up evidence throughout this project and this will be part of evidence submission to the NHFC.

## 9. INTELLECTUAL PROPERTY

- a) Service provider will be contracting with the NHFC and the work to be done will be for the NHFC. All records and data produced through this project in whatever format will be the confidential information and property of the NHFC.
- b) All information, documents and records received from the NHFC and any of the related parties, are to be kept confidential and may not be used or distributed in any format. All data, product including but not limited to standard forms information summary outcome and report will remain the confidential property of the NHFC and may not be used or distributed in any format without the written approval of the NHFC. To this end the service provider will be required to sign a confidentiality agreement.

## **10. APPOINTMENT, COMMENCEMENT AND DURATION OF ASSIGNMENT**

The service provider will be expected to commence on an agreed date and the assignment must be completed within five-week period.

## **11. EVALUATION CRITERIA**

### **Criterion 1 – Compulsory Requirements**

Bidders will first be evaluated in terms of the gatekeeper/minimum requirements on page 1 of this document. Bidders who do not fulfil all the requirements or do not submit the required documents will not proceed to the next phase of functionality. Those who fulfil all the requirements or have submitted the required documents will be further evaluated on functionality.

### **Criterion 2 – Functionality**

Functionality is worth 100 points. The minimum threshold is **70** points. Bidders who score less than **70** points on functionality will therefore be disqualified. Bidders who score **70** points and above will be further evaluated in terms of price and preference points. The functionality evaluation is broken down as follows:

ELEMENT	FUNCTIONALITY WEIGHT	TOTAL SCORE
<b>Proposed Technical approach and methodology of the bidder:</b>	30%	
<p>Bidders understanding of the scope of work (<b>15 points</b>);</p> <ul style="list-style-type: none"> <li>Scope of work is referred to but is inaccurate (2)</li> <li>Copy and paste of the terms of reference (4)</li> <li>Reference to the full scope of work, with additions to the original scope ( 6)</li> <li>Reference to the full scope of work but written in own words (8)</li> <li>Reference to the full scope of work, written in own words and provision of examples of similar type of projects the service provider has undertaken (15)</li> </ul>		
<p>Proposed Methodology and Project Work Plan shows how specific proposed actions will lead to attainment of the various elements of this project deliverables (<b>15 points</b>);</p> <ul style="list-style-type: none"> <li>Short Project Work Plan that does not relate to the full scope of work (2)</li> <li>Methodology that includes the full scope of work, with own timeframes and deliverables (4)</li> <li>Methodology that includes the full scope of work, required timeframes and deliverables (6)</li> <li>Methodology that includes the full scope of work, required timeframes and deliverables. Inclusion of a project plan which indicates activities and timeframes that adhere to the terms of reference. (10)</li> </ul> <p>Methodology that includes the full scope of work, required timeframes and deliverables. Inclusion of a project plan which indicates activities and timeframes that adhere to the terms of reference. Project plan also includes a matrix which shows how the activities will result in attainment of the various elements/aspect of this project deliverables. (15)</p>		
<b>Suitability of the proposed team:</b>	70%	
<p>The Company or Team leader must have a minimum of five (5) years' experience in Research, knowledge of research approaches and methodologies, data analysis for similar demand studies;</p> <p><b>(Should be supported by the submission of a CV, company profile, organogram and or reference letters (5) years and above ) (30 points)</b></p> <p><b>* Failure to submit the aforementioned supporting documents will result in bidder scoring NIL Points</b></p> <ul style="list-style-type: none"> <li>4- 1 year' experience in conducting research, using research approaches and methodologies, analyzing data for demand studies – (0)</li> <li>5 years' experience in conducting research, using research approaches and methodologies, analyzing data for demand studies (15)</li> </ul>		

<ul style="list-style-type: none"> <li>• 6 - 7 years' experience in conducting research, using research approaches and methodologies, analyzing data for demand studies (20)</li> <li>• Over 8+ years' experience in conducting research, using research approaches and methodologies, analyzing data for demand studies (30)</li> </ul>		
<ul style="list-style-type: none"> <li>• Team members/leader must have a minimum of three (3) years' experience in conducting research studies within the human settlements sector (Comprehensive CV's) <b>( 25 Points)</b></li> </ul> <p><b>* Failure to submit the aforementioned supporting documents will result in bidder scoring NIL Points</b></p> <p>1- 2 years' experience in undertaking demand studies in the rental housing sector (0)</p> <p>3 years' experience in undertaking demand studies in the rental housing sector (10 )</p> <p>4 - 6 years' experience in undertaking demand studies in the rental housing sector (15)</p> <p>7+ years' experience in undertaking demand studies in the rental housing sector (25)</p>		
<p><b>Expertise of the Project Team leader (15)</b></p> <ul style="list-style-type: none"> <li>• Demonstrate that the team leader has the requisite qualification(s) in any one of the following: Survey generation and management/ Statistics/ Data collection/ Data analytics/ Data Science/ Marketing research and analytics/ Business Administration/ Business Analytics/ Research methodology/ Economics/ Monitoring and evaluation/ Marketing management to execute the project by submitting qualifications and CV of project team leader: <ul style="list-style-type: none"> <li>○ Undergraduate qualification = 10</li> <li>○ Honours Degree/ Postgraduate Diploma/ Masters Degree / PHD / Doctorate = 15</li> </ul> </li> </ul> <p><b>(Must attach proof of certified qualifications (Certification date should not be older than six (6) months)</b></p> <p><b>*Failure to submit the aforementioned supporting documents will result in bidder scoring NIL Points</b></p>		
<b>TOTAL POINTS</b>	<b>100%</b>	

### **Criterion 3- Price and BBBEE evaluation ( Specific goals)**

All bids that achieve the minimum qualifying score of **70** points for Functionality, (acceptable bids) will be evaluated further in terms of the 80/20 preference point system. The preference point's claim is in terms of the Preferential Procurement Regulations 2022 (**See page 10 of this document**)

### **SPECIAL CONDITIONS:**

- Quotations must be submitted in the bidder's company letterhead.
- No pre-payments are allowed, awarded bidder will be paid within 30 days after receipt of invoice.
- Quotation submitted should be based on Scope of Work/Key Deliverables. Failure to adhere to scope of will render your quotation non-responsive.
- Price(s) quoted must be firm and inclusive of VAT (If VAT registered) and inclusive of all costs and be
- valid for (60) days.
- **The quotation must be submitted via email to [Quotations04@nhfc.co.za](mailto:Quotations04@nhfc.co.za)**

Regards

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K. Mokhesi

Programme Manager

## SECTION 8

### PRICING AND DELIVERY SCHEDULE

Bidders are required to complete the attached Pricing Schedule

- 1 Prices must be quoted in South African Rand, inclusive of VAT.
- 2 Price offer is firm and clearly indicate the basis thereof.
- 3 Pricing Bill of Quantity is completed in line with schedule if applicable.
- 4 Cost breakdown must be indicated.
- 5 Price escalation basis and formula must be indicated.
- 6 To facilitate like-for like comparison bidders must submit pricing strictly in accordance with this price schedule and not utilise a different format. Deviation from this pricing schedule could result in a bid being declared non-responsive.
- 7 Please note that should you have offered a discounted price(s), NHFC will only consider such price discount(s) in the final evaluation stage on an unconditional basis.
- 8 Bidders are to note that if price offered by the highest scoring bidder is not market related, NHFC may not award the contract to the Bidder. NHFC may:
  - 9 negotiate a market-related price with the Bidder scoring the highest points or cancel the RFQ;
  - 10 if that Bidder does not agree to a market-related price, negotiate a market-related price with the Bidder scoring the second highest points or cancel the RFQ;
  - 11 If a market-related price is not agreed with the Bidder scoring the third highest points, NHFC must cancel the RFQ.
  - 12 if the Bidder scoring the second highest points does not agree to a market-related price, negotiate a market-related price with the Bidder scoring the third highest points or cancel the RFQ.

I / We \_\_\_\_\_ (Insert Name of Bidding Entity) \_\_\_\_\_ of \_\_\_\_\_

code \_\_\_\_\_

(Full address) conducting business under the style or title of: \_\_\_\_\_  
represented by: \_\_\_\_\_ in my capacity  
as: \_\_\_\_\_

being duly authorised,  
hereby offer to undertake and complete the above-mentioned work/services at the prices quoted in the bills of  
quantities / schedule of quantities or, where these do not form part of the contract, at a lumpsum, of R  
\_\_\_\_\_ (amount) in \_\_\_\_\_ numbers);  
\_\_\_\_\_