



REQUEST FOR PROPOSAL

RFP NUMBER : SHRA/RFP/SDT/10/202122

CLOSING DATE : Tuesday 16th November 2021

TIME : 16h00

DESCRIPTION : Appointment of a service provider to conduct a feasibility assessment and site development strategy for the delivery of social housing opportunities on the Crocodile farm site (Remainder of ERF 464), George in the Western Cape

BRIEFING:

Yes

☐

No

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DOCUMENTS IN THIS BID DOCUMENT PACK

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

SECTION A

1. Background
2. RFB Submission Conditions and Instructions
3. Terms of Reference
4. Evaluation Process
5. Evaluation Criteria

SECTION B

1. Special Conditions of Bid and Contract
2. General Conditions of Contract (Annexure A)
3. Invitation to Quote (SBD 1)
4. Pricing Schedule (SBD 3.3)
5. Declaration of Interest (SBD 4)
6. Preference Points Claim form in terms of Preferential Procurement Regulations 2017 (SBD 6.1)
7. Declaration of bidder's Past SCM Practices (SDB 8)
8. Certificate of Independent Bid Determination (SBD 9)
9. Submission Checklist

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SECTION A

1. BACKGROUND

The Social Housing Regulatory Authority (the "SHRA") was established in August 2010 by the Minister of Human Settlements in terms of the Social Housing Act, No. 16 of 2008. The SHRA is classified as a public entity in terms of Schedule 3A of the Public Finance Management Act.

1.1 MISSION

The SHRA will regulate and invest to deliver affordable rental homes and renew communities.

1.2 VISION:

Affordable rental homes in integrated urban environments through sustainable institutions.

1.3 FUNCTIONS

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

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2. RFP SUBMISSION CONDITIONS AND INSTRUCTIONS

2.1 FRAUD AND CORRUPTION

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

2.2 COMPULSORY BRIEFING SESSION

2.2.1 There will be **no compulsory briefing session** for this Request for Proposals

2.3 CLARIFICATIONS/QUERIES

2.3.1 Any clarification required by a bidder regarding the meaning or interpretation of the Terms of Reference, or any other aspect concerning the bid, is to be requested in writing (e-mail) from Mr Katlego Panana at scm03@shra.org.za by **12th November 2021 at 12h00**. The bid **number** should be mentioned in all correspondence. **Telephonic requests for clarification will not be accepted.** If appropriate, the clarifying information will be made available to all bidders by e-mail only.

2.4 SUBMITTING BIDS

2.4.1 The proposal should be emailed to:

Ms Katlego Panana
Email address: scm03@shra.org.za

NB: Due to the pandemic covid-19, hard copies will not be accepted as the office is not yet.

Bids should be emailed in the following manner, indicating the:

- ☐ RFB number: SHRA/RFP/SDT/10/202122
- ☐ Closing date and time: Tuesday 16th November 2021 at 16h00
- ☐ The name and address of the bidder

Documents submitted on time by bidders shall not be returned.

2.5 LATE BIDS

2.5.1 Proposals received late shall not be considered. A proposal will be considered late if it arrived only one second after 16h00 or any time thereafter. Proposals arriving late will not be considered under any

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circumstances and shall be deleted unopened. Bidders are therefore strongly advised to ensure that bids be emailed allowing enough time for any unforeseen events that may delay the delivery of the attachments.

2.5.2 The official Telkom time (dial 1026) will be used to verify the exact closing time (16h00).

2.5.3 Proposals sent to SHRA via an email shall be deemed to be received at the date and time of arrival on mailbox specified above.

2.6 FORMAT OF BIDS

2.6.1 Bidders must complete all the necessary bid documents and undertakings required in this bid document. Bidders are advised that their bid should be concise, written in plain English and simply presented.

2.6.2 Bidders are to set out their bid in the following format:

Part 1: Invitation to Bid

Bidders must complete and submit the Invitation to Bid document.

Part 2: Pricing Schedule

Bidders must complete and submit the pricing schedule document.

The appointed Service Provider will:

- Claim travel costs applicable to this contract as per the AA rates
- Book only economy class flight and preferably Group A hire cars, otherwise Group B are to be used for Service Providers outside of Gauteng.
- Book only hotels, or other equivalent accommodation up to a Rand value of R1 400 per night per person (including dinner, breakfast and parking).

The value of this bid is estimated not to exceed R750 000.00 (all applicable taxes included) and therefore the 80/20 system shall be applicable.

Part 3: Declaration of Interest

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

Part 4: Preference Points Claim Form in terms of the Preferential Procurement Regulations 2017

Bidders must complete and submit the Preference Points Claim Form.

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A trust, consortium or joint venture:

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

Part 5: Declaration of bidders past supply chain management practices

Each party to the bid must complete and submit the Declaration of past supply chain management practices

Part 6: Certificate of Independent Bid Determination

Bidders must complete and submit the "Certificate of Independent Bid Determination" document.

Part 7: Broad Based Black Economic Empowerment Certificate

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

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

Part 8: General Conditions of Contract

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

Part 9: Technical approach

Bidder must at least:

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Describe, in detail, exactly how they propose to carry out the activities to achieve the outcomes identified in the terms of reference. Bidders are required to have the basic office equipment and the resource/s (which must include, laptop, 3G connection, landline, own office with the basic office equipment) will be located within the region where the work will be done. They should identify any possible problems that might hinder delivery and indicate how they will avoid, or overcome such problems.

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

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

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

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

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

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

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

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

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

Please note that part 9 should be no longer than 10 single-sided A4 pages in Arial 11 (font size).

Part 10: Team Details

The bidder must provide:

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

Part 11: Experience in this field

It is essential the service provider displays:

- ☐ Experience as set out in the terms of reference
- ☐ The Bidder must provide at least three (3) reference letters on company letterheads of previous clients where the Bidder provided similar services.

Part 12: Bidders National Treasury Central Supplier Database (CSD) forms indicating the validity of the bidder's registration

2.7 PRESENTATIONS

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

2.8 NEGOTIATION

- 2.8.1 SHRA has the right to enter into negotiation with a prospective service provider regarding any terms and conditions, including price(s), of a proposed contract.

- 2.8.2 SHRA shall not be obliged to accept the lowest of any quotation, offer or bid.

- 2.8.3 SHRA issues this bid invitation in good faith; however, it reserves the right to:

- ☐ Cancel or delay the selection process at any time, without explanation,
- ☐ Not to select any of the respondents to this bid invitation, without explanation,
- ☐ Exclude certain services, without explanation.

- 2.8.4 All bidders will be informed whether they have been successful or not. A contract will only be deemed to be concluded when reduced to writing in

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a contract form signed by the designated responsible person of both parties. The designated responsible person of SHRA is the Chief Executive Officer or his/her written authorised delegate.

2.9 REASONS FOR REJECTION

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

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

2.9.2.1 have abused the Supply Chain Management systems of SHRA.

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

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

2.9.3 Such actions shall be communicated to the National Treasury.

3. TERMS OF REFERENCE

3.1 INTRODUCTION AND BACKGROUND

- 3.1.1 The Social Housing Regulatory Authority (“SHRA”) was established through an Act of Parliament as prescribed in terms of the provisions of the Social Housing Act (Act 16 of 2008), hereafter referred to as “the Act”. The SHRA is classified as a national public entity in terms of Schedule 3A of the Public Finance Management Act (Act 1 of 1999) (“PFMA”). The SHRA has been operational since January 2011.
- 3.1.2 The SHRA’s mandate is to manage investment in the social housing sector, to regulate the sector and to provide appropriate support such that the sector may grow and be an integral part of sustainable human settlement. The primary intention of the Act is to facilitate delivery of affordable rental housing to the low to medium income groups. The main aim of social housing in terms of the legislation and policies related to social housing is to achieve spatial, economic and social integration of the urban environments in South Africa and, as a result, contribute to proper restructuring in the strive towards sustainable human settlements. To achieve this, it is important to provide appropriate support such that projects that may achieve these aims are identified, planned, and implemented.
- 3.1.3 In terms of the provisions of the Act, the SHRA may consider providing support to the social housing sector via institutional investment grants. One of the categories of grants relate to **project feasibility** and **project packaging** where projects with potential are identified and then supported with grants to assess the potential for social housing and make these on the social housing pipeline.
- 3.1.4 George Municipality in conjunction with the Western Cape Department of Human Settlements (“WCDHS”) has identified precincts where social housing projects could potentially be implemented. The potential development and urban renewal within these precincts align with the Spatial Development Framework of George Municipality (council approved in 2019).
- 3.1.5 Additional work is required to investigate the development potential within the precincts, specifically, but not exclusively for social housing. As such, an application was made for the SHRA project feasibility grants in terms of the institutional investment programme.

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3.2 POLICY AND LEGISLATIVE FRAMEWORK

The need to restructure the apartheid spatial structure and form that defines South African towns and cities has been emphasised in numerous national, provincial and municipal policy documents, including the legislation and policies that relate to social housing, spatial planning and land use management. This, in part, requires government at all levels to make opportunities for affordable and social housing to be delivered in well-located areas of these towns and cities. Specifically, the Social Housing programme is applied in Restructuring Zones which are defined as “geographic areas identified for targeted investment, based on the need for social, spatial and economic restructuring of the areas and specifically provided for in a local government IDP and agreed and aligned to provincial priorities” (Department of Housing Criteria for Provinces & Municipalities in defining Restructuring Zones).

The precincts that form part of this assignment are located within a Restructuring Zone and social housing within these precincts may therefore contribute to all three dimensions of restructuring where it brings lower income people closer to areas with economic opportunities from which they would otherwise be excluded because of the land market and the effect of land use planning while also promoting a mix of race and class.

The Western Cape Government adopted five provincial strategic goals to guide development in the Western Cape and each of these are accompanied by a series of strategic outputs and measures. The Western Cape Department of Human Settlements is primarily guided by Provincial Strategic Goal 4 which commits the province to “enable a resilient, sustainable, quality and inclusive living environment”. The provision of social and affordable housing forms a core part of achieving this.

3.3 PURPOSE

The purpose of this bid is to appoint a Team of Professionals to develop a site development strategy, undertake the necessary feasibility assessment as well as draft a process plan and cost matrix towards delivery of social housing opportunities, amongst other uses, on the Crocodile Farm Site (Remainder of Erf 464) in George (see Figure 1 and 2).

3.4 PROJECT PARTICULARS

Figure 1 below shows the current Restructuring Zones within the George Municipality. There are various portions of land within this zone that are well located (i.e. proximity to facilities, services, and potential job opportunities) and where the land is owned by the municipality.

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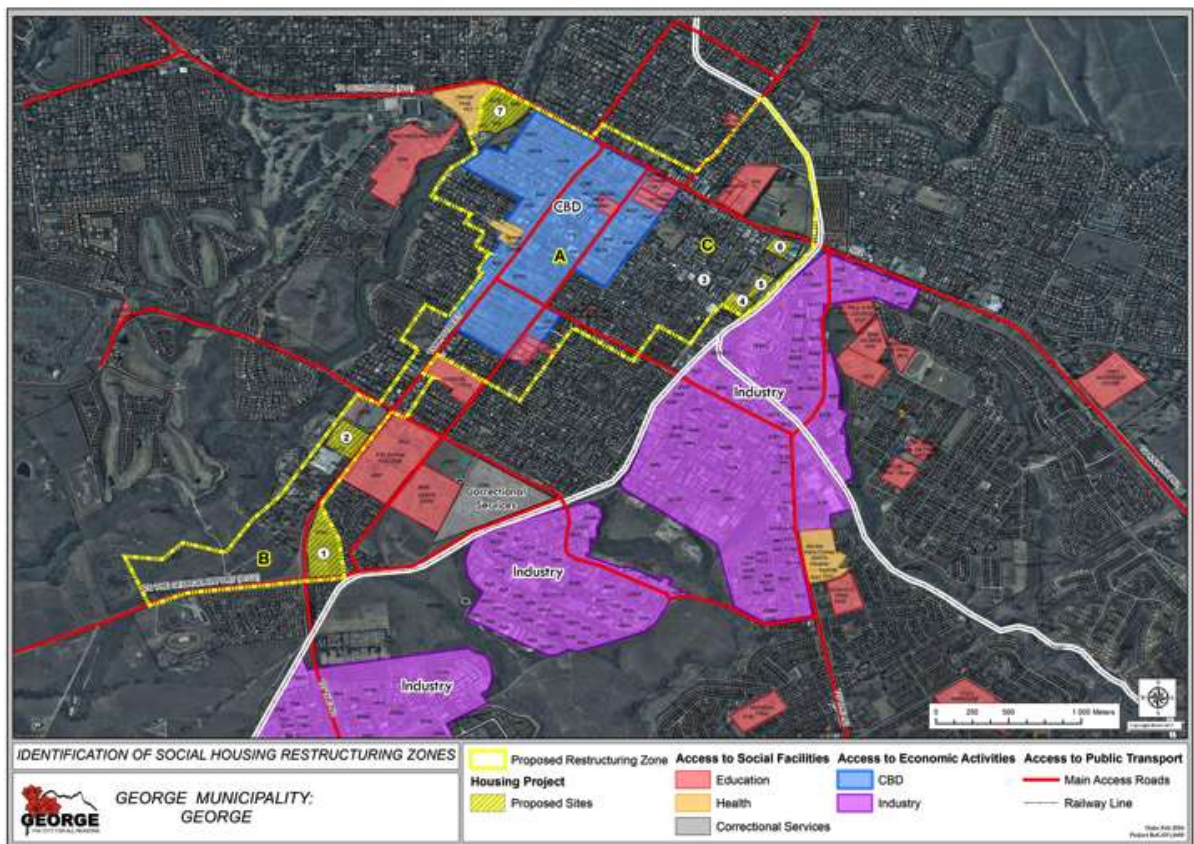


Figure 1: The Approved Restructuring Zone for George Municipality



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Figure 2: Showing the Western Node Precinct (on the left – indicated as ‘B’) of George with site 1 being the Crocodile Farm. The portion of interest for purpose of this assignment is highlighted in yellow on the right-hand side (roughly 2.4 hectares in extent)

One of the sites as described in George’s Restructuring Strategy is known as the ‘Crocodile Farm’ (Site 1: Portion of the Remainder of Erf 464, George) and is described below in more detail.

Site 1: Crocodile Farm (Remainder of ERF 464, George)

- 1) This land parcel is owned by the municipality.
- 2) Strategically located in terms of the potential for densification and serves as a connectivity link to business hubs.
- 3) Located at the intersection of Hope and York Streets.
- 4) Approximately 4.8 hectares in extent.
- 5) Current zoning: Undetermined zone.
- 6) Adjacent existing residential neighbourhood with potential for integration.
- 7) Proximity to schools and consumer amenities.
- 8) Potential ‘face of George’ / gateway as a southern approach to the CBD of George.
- 9) On intersection that merges significant tourist and commercial corridors, linking rural and urban.
- 10) Prominent arrival point on approach from the George airport (along the R102).
- 11) In proximity to industrial development and employment opportunity to the south and east, with future industrial development envisaged to the south-west of the site.
- 12) Opposite strategic vacant municipal owned land situated to the west where potential future employment in trade and business can be achieved.

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- 13) Direct access onto main public transportation corridor.
- 14) The prominence of the site requires planning that honours the potential for creating a 'sense of arrival' into the town, leave a positive impression on arriving tourists both in respect of the city scape and the natural landscape.
- 15) The northern backdrop of the site is the Outeniqua mountains and the impact of design on natural heritage needs to be considered.

3.5 SCOPE OF WORK

The scope of work applicable to this assignment will be initiated with an initial pre-screening phase. Once the pre-screening has been concluded, the analysis phase will continue that takes initial work undertaken during the technical assessments further to appropriately inform site development plan layout options and alternatives. Based on the assessments and requirements a preferred option or alternative must then be selected in consultation with the SHRA, WCDHS and George Municipality, where after the precinct alternatives must be developed such that a detailed implementation strategy can be mapped going forward.

It should be noted that some pre-screening work has already been undertaken for the site in the George Restructuring Strategy.

The implementation strategy will form the basis of the final work to be undertaken within the respective precincts in more detail such that a project or projects within the precincts may qualify for the social housing Consolidated Capital Grant (CCG) administered by the SHRA and comprised of provincial institutional subsidy and the Restructuring Capital Grant.

The task team consisting of the SHRA, WCDHS and George will be the formal reporting structure for the assignment and in this regard a programme with regular feedback sessions to the reporting structure is envisaged. In this regard monthly progress reporting and meetings are envisaged and these meetings will also be used to interrogate work undertaken and give guidance on the way forward, for instance when decisions in terms of the assignments need to be taken.

The following are therefore the phases of the scope:

3.5.1 PRE-SCREENING PHASE

Initial delineation of site and screening of land within the site

As the first step in the project process, it would be important to determine what portion(s) of the site, whether state owned or private, could potentially be utilised for social housing opportunities; although these may be amended during the process as new information arises. It is envisaged that a fairly accurate site area can be identified in consultation with the task team.

In respect of the Crocodile Farm Site, detailed determinations must be made of the distinction between potential social housing and commercial/business uses.

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Once the delineation within the precinct has been made the state-owned land parcels within the precinct that require further investigation must be identified. An initial screening of the land within the precinct would therefore be required to determine which of the land parcels will be assessed in more detail. The initial screening will consider ownership, zoning and current spatial planning proposals and the technical assessment already undertaken will also inform this screening to decide on the list of properties/parcels within the precinct to form part of the more detailed assessment. The following documents contain information on work that has already been done in respect of this precinct and its immediate surrounds (these documents can be found on the webpage of the municipality; the completed studies will be made available to the service provider):

- 1) George Settlement Restructuring strategy.
- 2) Gwayang LSDF.
- 3) George CBD LSDF.
- 4) Incentives.
- 5) Croc farm study.
- 6) Traffic Impact Assessment (to be commissioned by the municipality following site layout plan / massing studies done for the site).
- 7) GIPTN plans.
- 8) Geotech Survey (completed 27 October 2020)

The regional context of these sites must be considered during this phase since connectivity, legibility, and the potential to create an urban fabric that can potentially have a larger impact should be strived for. This may also have benefit in the medium to longer term for the surrounding area, where value can be created. Such value would not necessarily only be financial in terms of for instance property values, but may also include aspects related to social, economic, and spatial restructuring in line with the principles of social housing.

Sustainability and the development of and quality environment with adequate access to open space systems must be taken into consideration. Potential for and means of integration with immediate surroundings and entities within proximity to the site must be considered.

3.5.2 ANALYSIS PHASE

Upfront it should be noted that the municipality has already undertaken elements of this analysis phase and hence the purpose of this exercise would be to review and confirm what the municipality has made in its own findings and fill the gaps in the analysis where there is insufficient detail or where spatial structuring elements may have changed since the investigations have been undertaken.

3.5.2.1 Legal investigation

The legal investigation will include Investigation and assessment of all

- a) legal registered cadastral
- b) tenure documents and deeds relevant to the site

These documents would need to be assessed such that the constraints in terms of the site assembly and how these may potentially be mitigated and/or accommodated and/or removed may be reported on in terms of the legal investigation. Said investigation needs to link up with the town planning investigation since the recommendations in this legal investigation will determine the nature of the land development applications required as part of the town planning requirements.

George municipality can provide all legal cadastral and applicable title deeds if on record.

3.5.2.2 The heritage assessment

The heritage legislation and requirements also need to be investigated in relation to build, natural and cultural heritage since properties within the precinct may be subject to Heritage Impact Assessment requirements. The preferred development concept should also respond to conservation of existing heritage value.

3.5.2.3 Environmental impacts

Potential environmental impacts must also be identified, specifically those impacts that may trigger the need for environmental authorization.

3.5.2.4 Town planning investigation

The town planning investigation will consider all town planning requirements, constraints, and opportunities for the selected site, also considering heritage impact assessment, possible environmental assessment triggers, as well as traffic impact assessment triggers. An investigation on socio-economic impact must also be undertaken to inform the town planning motivation. Findings from the legal investigation that impact of the town planning investigation must be integrated in the application/process response.

Engagement with heritage authorities, service providers in social amenities and roads authorities is required to inform the alternatives proposed for the development of the sites. All engagements with such authorities must be recorded in minutes and must be led in a manner that seeks agreement on possible alternatives. The time frames in respect of all related processes informing the town planning process need to be discussed and confirmed.

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The town planning investigation must also include a need (high-level desk-top) and design analysis to inform the typologies, design, density, and layout of the developments. Zoning parameters (for instance parking, height of buildings, setbacks, road reserve requirements etc.) need to be discussed and agreed on with municipal officials and accordingly this needs to be recorded in the minutes of said meetings. Any potential community facility requirements also need to be investigated and confirmed such that any proposals in terms of such facilities may eventually enjoy support from the local community. It is important that the conceptual design is informed by all these discussions such that it may enjoy the required support since it would have to eventually be submitted for evaluation and approval.

3.5.2.5 Services Investigation

The services investigation would require a high-level investigation into the bulk capacity that is available and would also include discussions with the relevant officials to confirm the current capacity and the requirements as a result of the development such that this may inform the feasibility accordingly. The current servitudes and position of services also need to be investigated since this would potentially have an impact on the development and the conceptual design thereof. The outcome of this investigation must illustrate whether modelling or further specialist investigation may be needed prior to finalising the planning process. Cognizance must be taken of the need for new as well as findings of existing traffic impact assessments.

3.5.2.6 Stakeholder identification

An identification of stakeholders in the process of acquiring, developing, and implementing potential proposals and social housing opportunities.

3.6 CONCEPTUAL DEVELOPMENT PHASE

Once the pre-screening and analysis has been concluded, conceptual development proposals for the precinct may be prepared. This phase will again consist of various components and must include/respond to the informants from the analysis phase.

3.6.1 Identifying design informants

Based on the analysis it will be possible to develop a map or plan that indicates the spatial and other informants identified in the analysis. These are generally referred to as the design informants and may for instance include physical characteristics such as the position of existing buildings and structures, access points, environmental constraints, or roads etc. It may however also relate to other matters such as modes of transport used, whether pedestrian walkways would be required and the integration of any precinct designs and plans with the surrounding areas and open space systems such that the sites will not be islands within the urban context.

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3.6.2 Prepare conceptual designs with alternative concepts for the site

Once the design informants have been formulated, conceptual designs and concepts may be prepared for the site. Ideally these should be discussed in detail since all the concepts would inevitably have advantages but also negative aspects and in this regard the project team should be able to eventually understand the non-negotiables and concepts that add significant value. Each alternative needs to be measured against its compliance with the principles of SPLUMA, the IDP strategic goals and spatial strategies and related policies of the MSDP.

It should be noted that while the intention of this project and site development plan is primarily to provide social housing opportunities, the site development plan must also make provision for other uses for the site, speaking to the urban development opportunities that exist in relation to this site providing retail, commercial, conferencing or other uses reconcilable with the social housing development and surrounding, while consistency with the vision to be the 'face of George' is observed and demonstrated.

3.6.3 Prepare massing studies for the various alternative concepts

It would be difficult to decide on a preferred alternative without undertaking work on massing. However, to limit the amount of work to be undertaken in the exercise the discussions on the concepts need to eventually reach a point where the alternatives are limited to two options, with minor variances within these broader alternatives. The feasibility / cost benefit of each alternative needs to be addressed at this stage to inform whether it would be financially viable to undertake more detailed work on either of the concepts.

3.6.4 Develop typologies based on the design concepts

While similarities between the alternatives are anticipated, the mix in typologies and feasibility of different design alternatives must be demonstrated. The different typologies and the way that this is incorporated into the precinct will also have cost implication and again, financial input during this stage would be important.

Prepare initial site development plans, including urban design, a schedule containing number of units within each typology, unit sizes and development parameters. Where relevant, business or retail component may need to be included.

Once an initial site development plan for each of the two alternatives is available with an indication of the costing implications as well as sufficient design work to compare the plans in terms of integration, design and other considerations, informed decisions on the preferred alternative can be taken.

3.6.5 Select the preferred alternative and refine

The preferred alternative will then be refined to the extent that specific projects within the site are delineated with an indication of the potential phasing and the

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overall implementation plan. This will result in a product that can be presented for financial pre-feasibility modelling.

3.7 Financial pre-feasibility modelling

The financial pre-feasibility modelling will be undertaken in consultation with the Province, SHRA and George Municipality since the implementation of the project will ultimately become the joint responsibility of all these parties. It is required of the service provider to provide the following in terms of the modelling:

- 1) The project activities with estimated times to complete each activity (e.g Bulk Infrastructure, Rezoning, Roads)
- 2) Project area analysis (gross building area, number of units, sizes).
- 3) A completed pre-feasibility assessment of the preferred alternative using high order of magnitude numbers.

The projects within the site will then be incorporated into the respective pipeline to ensure that subsidies and funding required for implementation may be appropriately aligned and made available.

As part of the financial assessment, it would also be important to consider the impact of the preferred alternative on affordability and to make a comparison with similar private and public-sector accommodation. These considerations are important since the mandate remains the provision of affordable rental in good locations, achieved with Government intervention.

3.8 KEY DELIVERABLES

A Project Initiation Document (PID) to be completed in accordance with the SHRA guidelines and requirements after the project initiation meeting. This document will deal with more detail on the deliverables, based on the Terms of Reference, and will also specify the exact time frame with invoices attached to the various deliverables in accordance with an agreed project programme.

- 1) Delivery of a **Precinct Delineation report** that addresses the rationale of the delineation process and considers the site within a regional context, as explained in section 5 (pre-screening phase) above.
- 2) Delivery of an Analysis Report that deals with the legal, town planning, services and addresses all the aspects detailed in section 5 above.
- 3) Development of the conceptual design alternatives and refining the preferred alternative to such an extent that the financial pre-feasibility work may be concluded.
- 4) Delivery of the pre-financial feasibility (high order of Magnitude estimate) as detailed above with all the key deliverables then combined into a final

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report with recommendations and an implementation plan linked to proposed time frames.

- 5) **Cost matrix/process plan** to implement proposal – A detailed work breakdown structure of all the steps that the municipality will need to follow, in conjunction with the Social Housing Institution (SHI) that will be appointed to develop the project, and own and manage the housing stock, to implement the social housing proposal, including pricing on land development applications and specialists in the next phase.

3.9 REPORTING AND MEETINGS

The task team already established will be the structure to whom the successful service provider will report, produce, and submit reports monthly. The format of the reporting must be compatible with the requirements of the Departmental Project Office (PMO) of the George Municipality. All documentation should be submitted in electronic word document format together with 3 hard copies.

A. Typical monthly reporting requirements will entail the following:

1. Minutes of meetings.
2. Monthly project progress reports (milestone reporting, financial/budgetary, quality control/assurance reporting and cash flow).
3. Issue, risk, and variation reports.
4. Any specific/ad hoc reporting that may be required.
5. Monthly meetings will be conducted whereby the service provider and the task team should give feedback on progress made and interventions required.
6. Breakdown of costs and invoicing / balances.
7. Changes and updates to process plan.

All minutes and records of all meetings shall be prepared by the appointed service provider.

The task team will provide strategic guidance and available documentation and information as and when required. Members of the task team will make themselves available for the various agreed meetings and will review and make comments on all draft documents as per the agreed schedules.

B. PROJECT/CONTRACT PERIOD

It is anticipated that the project/contract period will be six (6) months from the date of the appointment of the service provider. Proposals should include a detailed breakdown of the activities and deliverables and these should align to the scope of work and be linked to a breakdown of costs and invoicing.

C. REQUIRED EXPERIENCE AND QUALIFICATION CRITERIA

Since the project deals with several disciplines, a suitably qualified project/development manager/Quantity Surveyor, or Architect and Urban Design as team leader/principal bidder with a **minimum of Five (5) years'** experience in similar assignments will be best suited to undertake and manage a project of this nature.

All team members must be registered with the relevant professional bodies (valid, certified copies of the registration to be attached to the proposal). Proposals where Team members are not registered with the relevant professional bodies will be disqualified.

The multi-disciplinary team must have a minimum of three (3) years' experience in each of the relevant areas to undertake the work in terms of this project proposal.

- 1) A rental housing specialist with proven experience in social and rental housing programmes.
- 2) Town and regional planners.
- 3) Architect or urban designer. It is however important that the members on the team responsible for planning and design are able to provide supporting evidence of planning and design work undertaken in respect of urban precincts, specifically also where a large higher density residential component formed an integral part of the precinct.
- 4) A Quantity Surveyor or any other professional with housing development finance proven experience in assistance with project packaging and financing of social and rental housing projects would also be required. This is important since the subsidy regime needs to be clearly understood in the context of the precinct proposal. It is suggested that a quantity surveyor or property finance expert be included in the project team.
- 5) Civil engineering expertise, environmental assessment expertise and heritage expertise must be available to the consultant, should these skills be required.
- 6) Bidder must have done at least three similar assignments / projects successfully in the past.

3.10 SUBMISSION REQUIREMENTS AND FORMAT OF THE PROPOSAL

The format of the proposal the bidder submits is required to consist of and demonstrate the following:

Section 1

- I. Understanding of the required scope of work
- II. Methodology and approach
- III. Value add

Section 2

- I. Profile of the bidder

RFP: Appointment of a service provider to conduct a feasibility assessment and site development strategy for the delivery of social housing opportunities on the Crocodile farm site (Remainder of ERF 464), George in the Western Cape

- II. Team composition, roles and responsibilities
- III. Experience of the bidder's team and outputs matrix
- IV. Detailed CVs of all team members
- V. At least 3 Reference letters with contactable references confirming service provider successful completion of similar projects

Section 3

- I. Bidders are expected to provide an all-inclusive cost of this project with the following clearly indicated:
- II. Daily rate of each consultant with anticipated number of days to complete assignment
- III. Anticipated travel and disbursements
- IV. Total cost of ownership on this assignment

Bidders are reminded that the SHRA will award the bid based on a bidder's total project cost and not hourly or daily rates. The bidders must ensure that the delivery of this project is within the required timeframes as stipulated in the Terms of Reference.

3.11 ACCOUNTABILITY AND REPORT

- 3.11.1 The service provider will report to the Project Development and Funding Portfolio Manager and Sector Development and Transformation Specialist who both serves as a Project Manager and Sponsor for this project of the SHRA.
- 3.11.2 A Project Initiation Document will be developed and signed upon appointment which will outline the deliverables, timeframes, milestones, and disbursement schedule
- 3.11.3 The service provide will be required to compile intermediary project progress report on the project giving an outline of the work and progress of thus far achieved in the project. The service provider will also be required to compile all minutes of the meetings held on the project and associated action registers and submit to the SHRA within 48 hours of that meeting.

3.12 PROMOTION OF EMERGING BLACK OWNED ORGANISATIONS

- It is the SHRA's objective to promote transformation within the social housing sector. Bidders are encouraged to partner with black owned entity (being 50% +1 black owned and controlled) such partnership may include the formation of a joint venture and/ or subcontracting agreement etc. To give effect to this requirement, bidders are required to submit a partnership/ subcontracting proposal detailing the portion of work to be outsourced.
- **Service providers that are level 1 and 2 B-BBEE contributors will be given a preference.**

4. EVALUATION PROCESS

4.1 COMPLIANCE WITH MINIMUM REQUIREMENTS

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

4.2 PRE-QUALIFICATION CRITERIA FOR PREFERENTIAL PROCUREMENT

4.2.1 As per the preferential Procurement Regulations (PPR) 2017, the SHRA is applying Pre-Qualification Criteria this bid in an effort to advance certain designated groups.

4.3 FUNCTIONALITY, PRICE AND PREFERENCE POINTS

4.3.1 All remaining bids will be evaluated as follows:

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

4.3.3 The second part will then be done on the 80/20 split whereby (80) points will be awarded for price and 20 points will be awarded for B-BBEE Status Level Contribution.

4.4 ELIMINATION OF BIDS ON GROUNDS OF FUNCTIONALITY

4.4.1 Bids that score less than 70% of the 100% available for functionality will be eliminated from further consideration. Points will therefore not be awarded for their cost bids or for B-BBEE Status Level of Contribution

4.4.2 The percentage scored for functionality should be calculated as follows:

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

$$P_s = \frac{S_o}{M_s} \times A_p$$

where

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

So = total score of bid/bid under consideration

Ms = maximum possible score

Ap = percentage allocated for functionality

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

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

4.5 PRESENTATIONS

4.5.1 SHRA may decide to have compulsory presentations made by Bidders who met the minimum functionality criteria once the functionality score has been calculated.

4.5.2 Presentations shall only affect the marks awarded for functionality. If SHRA wishes to use presentations as an additional selection criterion between bidders, the evaluation criteria to be affected shall be determined in advance and due allowance made in the mark scheme.

4.5.3 If the date of the presentation meeting is not indicated in the bid document, at least three days' notice will be given to bidders required to attend a presentation.

4.5.4 Presentations will be made to the full Evaluation Committee.

4.5.5 Points determined by the presentation will be awarded to each bidder by each member of the Evaluation Committee and then an average calculated.

4.6 AWARDING OF PREFERENCES POINTS

4.6.1 Points for B-BBEE Status Level of Contribution will be awarded according to the table indicated in the preference points claim form(s).

4.7 COMBINING PRICE AND PREFERENCE POINTS

4.7.1 The B-BBEE Status Level of Contribution marks for each bid will now be added to the price points for that bid

4.7.2 The Evaluation Committee may recommend that the contract be awarded to the bidder obtaining the highest aggregate mark as determined by 4.5.1 or to a lower scoring bid based on firm, verifiable and justifiable grounds.

4.8 ADJUDICATION OF BID

4.7.1 The Adjudication Committee will consider the recommendations and make the final award. The successful bidder will usually be the service provider scoring the highest number of points or it may be a lower scoring bid based on firm, verifiable and justifiable grounds or no award at all.

5. EVALUATION CRITERIA

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

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

5.2 The following table will demonstrate the criteria to be used for allocation of points for functionality as outlined above. Bids scoring less than 60 points on functionality will be eliminated from further consideration.

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

5.4 PROPOSED SELECTION CRITERIA

5.4.1 Functionality

- Proposed Technical approach of the bidder (see requirements in **Part 9**);
- Suitability of the proposed bidder (see requirements in **Part 10**);
- Experience of the Bidder (see requirements in **Part 11**)

ELEMENT	FUNCTIONALITY EVALUATION		FUNCTIONALITY WEIGHT	PRESENTATIONS WEIGHT (IF APPLICABLE)	TOTAL SCORE
Proposed Technical approach and methodology of the bidder:	Rating out of 5	Evaluation criteria	30%		
Bidders understanding of the scope of work (10 points);	1	Scope of work is referred to but is inaccurate			
	2	Copy and paste of the terms of reference			
	3	Reference to the full scope of work, with minor changes on the original scope			
	4	Reference to the full scope of work but written in own words			
	5	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			
Proposed Methodology and Project WorkPlan shows how proposed actions will deliver the desired deliverables (20 points);	1	Proposed Methodology that does not relate to the full scope of work			
	2	Methodology that includes the full scope of work, with own timeframes and deliverables and doesn't include a Project WorkPlan			
	3	Methodology that includes the full scope of work, required timeframes and deliverables but still doesn't include a Project WorkPlan			
	4	Methodology that includes the full scope of work, required timeframes and deliverables. Inclusion of a project WorkPlan which indicates activities and timeframes that adhere to the terms of reference.			
	5	Methodology that includes the full scope of work, required timeframes and deliverables. Inclusion of a project WorkPlan which indicates activities and timeframes that adhere to the terms of reference. Project WorkPlan also includes a matrix which shows how the activities will result in			

		specific deliverables			
Suitability of the proposed team:	Rating out of 5	Evaluation criteria	70%		
<p>The bidder or Team Leader must have minimum five (5) years and above experience in Project Feasibility and project packaging in Rental housing developments. (Submitted company profile and Team Leader CVs, Qualifications and professional registration)</p> <p>(25 points);</p>	1	0-2 years' experience in project packaging feasibility in Housing developments (company profile and/ or Team's CVs)			
	2	3-4 years' experience in project packaging feasibility in Rental Housing developments (company profile and/ or Team's CVs)			
	3	5 years' experience in project packaging feasibility in Rental Housing developments (company profile and/ or Team's CVs)			
	4	6 years' experience in project packaging feasibility in Rental housing developments (company profiles and or Teams' CVs)			
	5	7+ years' experience in project feasibility in Rental housing developments (company profiles and or Teams' CVs)			
<p>The bidder has at least three (3) years' experience in successfully conducting similar project feasibility studies and project packaging. Attach a minimum of three reference letters (10 points);</p>	1	No reference letters attached			
	2	1-2 reference letters attached			
	3	3 reference letters attached			
	4	4-5 reference letters attached			
	5	6 or more reference letters attached			
<p>The team composition must have the following competencies: minimum of three (3) years' experience in the following areas QS, Urban design, Engineering, Town Planning, Architecture. (Qualifications and professional</p>	1	0-1 experience and no relevant qualifications and professional registrations attached			
	2	2 years' relevant experience and qualifications attached			
	3	3 years' relevant experience, qualifications and professional registration/s attached			
	4	4 years' relevant experience, qualifications and professional registration/s attached			

registration must be attachment) (20 points)	5	5+ years and above relevant experience, qualifications and professional registration/s are attached			
<ul style="list-style-type: none"> Team members must have 3 years' experience in project feasibility for brownfields (CV attached) (15 points)	1	0-1 year of experience in project feasibility			
	2	2 years' experience in project feasibility with attachments of CVs			
	3	3 years' experience in project feasibility with attachments of CVs			
	4	4 years' experience in project feasibility with attachments of CVs			
	5	5+ years and above experience in project feasibility with attachments of CVs			

NB: All team members must be registered with the relevant professional bodies (valid, certified copies of the registration to be attached to the proposal). Proposals where Team members are not registered with the relevant professional bodies will be disqualified

5.4.2 Functionality Evaluation

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

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

5.4.3 Preferential Procurement Evaluation

Evaluation Criterion on Price and BBBEE	
Relative competitiveness of proposed price	80
B-BBEE Status Level of Contribution	20
TOTAL FOR PRICE AND PREFERENCE	100

The value of this RFP is estimated **not to exceed R750 000.00** (all applicable taxes included) and hence it is issued as a closed Request

A bidder must achieve a minimum average score of 70% to qualify for further evaluation.

SECTION B

1. SPECIAL CONDITIONS OF CONTRACT

1.1.GENERAL

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

1.2.ADDITIONAL INFORMATION REQUIREMENTS

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

1.3.CONFIDENTIALITY

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

1.4. INTELLECTUAL PROPERTY, INVENTIONS AND COPYRIGHT

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

data, designs, concepts and other information whether capable of being copyrighted or not ("IP").

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

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

1.4.7. The Service provider acknowledges and agrees that:

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

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

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

1.5. NON-COMPLIANCE WITH DELIVERY TERMS

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

1.6. WARRANTS

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

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

1.7. PARTIES NOT AFFECTED BY WAIVER OR BREACHES

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

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

1.8. RETENTION

1.8.1 On termination of this agreement, the Service provider shall on demand hand over all documentation, information, software, etc., relating to the provision of services as per this bid without the right of retention, to the SHRA.

1.8.2 No agreement to amend or vary a contract or order or the conditions, stipulations or provisions thereof shall be valid and of any force and effect unless such agreement to amend or vary is entered into in writing and signed by the contracting parties. Any waiver of the requirement that the agreement to amend or vary shall be in writing, shall

2. GENERAL CONDITIONS OF CONTRACT

2.1 The General Conditions of Contract must be accepted. The general conditions applicable to government entity bids, contracts and order are attached herein as **Annexure A** as they will apply to this bidding process.

2.2 Bidders are required to initial each page of the General Conditions of Contract as an indication of acceptance.

INVITATION TO SUBMIT BIDS

YOU ARE HEREBY INVITED TO PROPOSE FOR REQUIREMENTS OF THE SHRA

RFP NUMBER: SHRA/RFP/SDT/10/202122 **DATE:** 16th November 2021 **CLOSING TIME:** 16h00

DESCRIPTION: Appointment of a service provider to conduct a feasibility assessment and site development strategy for the delivery of social housing opportunities on the Crocodile farm site (Remainder of ERF 464), George in the Western Cape

VALITY PERIOD: Offer to be valid for 90 days from the closing date of the bid

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

BID DOCUMENT MUST BE email to the mail address: scm03@shra.org.za

Bidders should ensure that proposals are emailed timeously to the correct email address. If the proposal is late, it will not be accepted for consideration.

Proposals can be email anytime from receipt of this request until 16h00 on Tuesday, 16th November 2021.

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

This RFP is subject to the following:

- ☐ General Conditions of Contract (GCC) and, if applicable, any other Special Conditions of Contract.
- ☐ the Preferential Procurement Policy Framework Act, 2000
- ☐ the Preferential Policy Regulations, 2017
- ☐ **Proposals submitted that do not comply with the following will be disqualified**
 - A late Proposal (a proposal arriving one second after 16h00 or any time thereafter).

PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)					
BID NUMBER:	SHRA/RFP/SDT/10/202122	CLOSING DATE:	16 th November 2021	CLOSING TIME:	16h00
DESCRIPTION	Appointment of a service provider to conduct a feasibility assessment and site development strategy for the delivery of social housing opportunities on the Crocodile farm site (Remainder of ERF 464), George in the Western Cape				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
Email address: scm03@shra.org.za					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Ms Katlego Panana		CONTACT PERSON	Ms Katlego Panana	
TELEPHONE NUMBER			TELEPHONE NUMBER		
E-MAIL ADDRESS	Scm03@shra.org.za		E-MAIL ADDRESS	scm03@shra.org.za	
SUPPLIER INFORMATION					
NAME OF BIDDER					
NAME OF REPRESENTATIVE					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		[TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]					
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?		<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER PART B:3]
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS					
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE A BRANCH IN THE RSA?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
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, 2017, 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.
2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
2.6 WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

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

TOTAL BID PRICE (ALL INCLUSIVE)

SIGNATURE OF BIDDER:

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

DATE:

PRICING SCHEDULE
(Professional Services)

NAME OF BIDDER:

BID NO.: **SHRA/RFP/SDT/10/202122**

CLOSING TIME 16h00

CLOSING DATE: 16th November 2021OFFER TO BE VALID FOR **90** DAYS FROM THE CLOSING DATE OF BID.

ITEM NO	DESCRIPTION **(ALL APPLICABLE TAXES INCLUDED)	BID PRICE IN RSA CURRENCY
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1. The accompanying information must be used for the formulation of proposals.
- 2 Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project, (including VAT and all disbursements).
R.....

PERSONS WHO WILL BE INVOLVED IN THE PROJECT AND RATES APPLICABLE (CERTIFIED INVOICES MUST BE RENDERED IN TERMS HEREOF)

4.	PERSON AND POSITION	HOURLY RATE	DAILY RATE
	-----	R-----	-----
	-----	R-----	-----
	-----	R-----	-----
	-----	R-----	-----

5.	PHASES ACCORDING TO WHICH THE PROJECT WILL BE COMPLETED, COST PER PHASE AND MAN-DAYS TO BE SPENT		
	-----	R-----	-----days
	-----	R-----	----- days
	-----	R-----	----- days
	-----	R-----	----- days

- 5.1 Travel expenses (specify, for example rate/km and total km, class of air travel, etc). Only actual costs are recoverable. Proof of the expenses incurred must accompany certified invoices.

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT
-----	R.....
-----	R.....
-----	R.....
-----	R.....

TOTAL:

***"all applicable taxes" includes value- added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies.

- 5.2 Other expenses, for example accommodation (specify, e.g. Three star hotel, bed and breakfast, telephone cost, reproduction cost, etc.). On basis of these particulars, certified invoices will be checked for correctness. Proof of the expenses must accompany invoices.

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT
-----	R.....
-----	R.....
-----	R.....
-----	R.....

TOTAL: R.....

6. Period required for commencement with project after Acceptance of bid
7. Estimated man-days for completion of project
8. Are the rates quoted firm for the full period of contract? *YES/NO
9. If not firm for the full period, provide details of the basis on which adjustments will be applied for, for example consumer price index.
-

DECLARATION OF INTEREST

1. Any legal person, including persons employed by the state, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes an advertised competitive bid, a limited bid, a bid or written price quotation). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorized representatives declare his/her position in relation to the evaluating/adjudicating authority where-
 - the bidder is employed by the state; and/or
 - the legal person on whose behalf the bidding document is signed, has a relationship with persons/ a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.
2. **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**
 - 2.1 Full Name of bidder or his or her representatives:
 - 2.2 Identity Number:
 - 2.3 Position occupied in the Company (director, trustee, shareholder, member):
.....
 - 2.4 Registration number of company, enterprise, close corporation, partnership agreement or trust:
.....
 - 2.5 Tax Reference Number:
 - 2.6 VAT Registration Number:
 - 2.6.1 The names of all directors/trustees/shareholders/members, their individually Identity numbers, tax reference numbers and, if applicable, employee/PERSAL number must be indicated in paragraph 3 below.

1 "state means-

- (a) any national or provincial department, national or provincial public entity or constitutional within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);
- (b) any municipality or municipal entity;
- (c) provincial legislature;
- (d) national Assembly or the national Council of provinces; or
- (e) Parliament

2 "shareholder "means a person who owns shares in the company and is actively involved in the management of the enterprise or business and exercises control over the enterprise.

2.7 Are you or any person connected with the bidder presently employed by the state? **YES/NO**

2.7.1 If so, furnish the following particulars:

Name of person /director /trustees /shareholder /member:

Name of state institution at which you or the person connected to the bidder is employed:

Position occupied in the state institution:

Any other particulars:

.....

.....

2.7.2 If you are presently employed by the state, did you obtain the appropriate authority to undertake remunerative work outside employment in the public sector?

YES/NO

2.7.2.1 If yes, did you attach proof of such authority to the bid document?

YES/NO

(Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the bid.)

2.7.2.2 If no, furnish reasons for non-submission of such proof:

.....

.....

2.8 Did you or your spouse, or any of the company's directors/ trustees/ shareholders / members or their spouse conduct business with the state in the previous twelve months?

YES/NO

2.8.1 If so, furnish particulars:

.....

.....

.....

2.9 Do you, or any person connected with the bidder, have any relationship (family, friend, other) with a person employed by the state and who may be involved with the evaluation and or adjudication of this bid?

YES/NO

2.9.1 If so, furnish particulars:

.....

.....

.....

2.10 Are you, or any person connected with the bidder, aware of any relationship (family, friend, other) between any other bidder and any person employed by the state who may be involved with the evaluation and or adjudication of this bid?

YES/NO

2.10.1 If so, furnish particulars:

.....

.....

.....

2.11 Do you or any of the directors / trustees / shareholders / members of the company have any interest in any other related companies whether or not they are bidding for this contract?

YES/NO

2.11.1 If so, furnish particulars:

.....

.....

.....

3 Full details of directors /trustees / members /shareholders.

Full Name	Identity Number	Personal Income Tax Reference Number	State Employee Number/ Persal Number

4 DECLARATION

I, THE UNDERSIGNED (NAME).....

CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPH 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME SHOULD THIS DECLARATION PROVES TO BE FALSE.

.....

Signature

.....

Date

.....

Position

.....

Name of bidder

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2017

This preference form must form part of all bids invited. It contains general information and serves as a claim form for preference points for Broad-Based Black Economic Empowerment (B-BBEE) Status Level of Contribution

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:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2

a) The value of this RFP is estimated **not to exceed R750 000.00** (all applicable taxes included) and hence it is issued as a closed Request. **Therefore, the 80/20 reference point system shall be applicable.**

1.3 Points for this bid shall be awarded for:

- (a) Price; and
- (b) B-BBEE Status Level of Contributor.

1.4 The maximum points for this bid are allocated as follows:

	POINTS
PRICE	80
B-BBEE STATUS LEVEL OF CONTRIBUTOR	20
Total points for Price and B-BBEE must not exceed	100

1.5 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.

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

2. DEFINITIONS

- (a) **“B-BBEE”** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- (b) **“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;

SBD 6.1

- (c) **“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;
- (d) **“Broad-Based Black Economic Empowerment Act”** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- (e) **“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;
- (f) **“functionality”** means the ability of a tenderer to provide goods or services in accordance with specifications as set out in the tender documents.
- (g) **“prices”** includes all applicable taxes less all unconditional discounts;
- (h) **“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;
- (i) **“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;
- (j) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

3. POINTS AWARDED FOR PRICE

3.1 THE 80/20 PREFERENCE POINT SYSTEMS

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

80/20

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

Where

P_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

- 4.1 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 (80/20 system)
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

5. BID DECLARATION

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

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

6.1 B-BBEE Status Level of Contributor: = (maximum of 20 points)

(Points claimed in respect of paragraph 7.1 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.

7. SUB-CONTRACTING

7.1 Will any portion of the contract be sub-contracted?

(Tick applicable box)

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
-----	--------------------------	----	--------------------------

7.1.1 If yes, indicate:

i) What percentage of the contract will be subcontracted.....%

ii) The name of the sub-contractor.....

iii) The B-BBEE status level of the sub-contractor.....

iv) Whether the sub-contractor is an EME or QSE

(Tick applicable box)

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
-----	--------------------------	----	--------------------------

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

SBD 6.1

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		

8. OUTCOMES AGAINST PREFERENTIAL PROCUREMENT CRITERIA

B-BBEE status level of contributor	
Percentage owned by black people	
Percentage owned by black people who are youth	
Percentage owned by black people who are women	
Percentage owned by black people with disabilities	
Percentage owned by black people who are military veteran	
Percentage owned by black people living in rural or underdeveloped areas	
Percentage owned by black people living in townships	

9. DECLARATION WITH REGARD TO COMPANY/FIRM

9.1 Name of company/firm:.....

9.2 VAT registration number:.....

9.3 Company registration number:.....

9.4 TYPE OF COMPANY/ FIRM

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

[TICK APPLICABLE BOX]

9.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

.....

.....

.....

.....

.....

9.6 COMPANY CLASSIFICATION

- ☐ Manufacturer
☐ Supplier
☐ Professional service provider
☐ Other service providers, e.g. transporter, etc.
 [TICK APPLICABLE BOX]

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

9.8 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-BBE 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:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 6.1, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;
- iv) 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.

WITNESSES

1.

2.

.....
SIGNATURE(S) OF BIDDERS(S)

DATE:

ADDRESS

.....

DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

- 1 This Standard Bidding Document must form part of all bids invited.
- 2 It serves as a declaration to be used by Institutions in ensuring that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system.
- 3 The bid of any bidder may be disregarded if that bidder, or any of its directors have-
 - a. abused the institution supply chain management system
 - b. committed fraud or any other improper conduct in relation to such system; or
 - c. failure to perform on any previous contract.
- 4 **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**

Item	Question	Yes	No
4.1	Is the bidder or any of its directors listed on the National Treasury's Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector? (Companies or persons who are listed on this Database were informed in writing of this restriction by the Accounting Officer/Authority of the institution that imposed the restriction after the <i>audi alteram partem</i> rule was applied). The Database of Restricted Suppliers now resides on the National Treasury's website(www.treasury.gov.za) and can be accessed by clicking on its link at the bottom of the home page.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.1.1	If so, furnish particulars:		
4.2	Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)? The Register for Tender Defaulters can be accessed on the National Treasury's website (www.treasury.gov.za) by clicking on its link at the bottom of the home page.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.2.1	If so, furnish particulars:		
4.3	Was the bidder or any of its directors convicted by a court of law (including a court of law outside the Republic of South Africa) for fraud or corruption during the past five years?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.3.1	If so, furnish particulars		
4.4	Was any contract between the bidder and any organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.4.1	If so, furnish particulars:		

CERTIFICATION

I, THE UNDERSIGNED (FULL NAME)

CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM IS TRUE AND CORRECT.

I ACCEPT THAT, IN ADDITION TO CANCELLATION OF A CONTRACT, ACTION MAY BE TAKEN AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature

.....
Date

.....
Position

.....
Name of Bidder

CERTIFICATE OF INDEPENDENT BID DETERMINATION

- 1 This Standard Bidding Document (SBD) must form part of all bids¹ invited.

- 2 Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by, firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging).² Collusive bidding is a *pe se* prohibition meaning that it cannot be justified under any grounds.

- 3 Treasury Regulation 16A9 prescribes that accounting officers and accounting authorities must take all reasonable steps to prevent abuse of the supply chain management system and authorizes accounting officers and accounting authorities to:
 - a. disregard the bid of any bidder if that bidder, or any of its directors have abused the institution's supply chain management system and or committed fraud or any other improper conduct in relation to such system.
 - b. cancel a contract awarded to a supplier of goods and services if the supplier committed any corrupt or fraudulent act during the bidding process or the execution of that contract.

- 4 This SBD serves as a certificate of declaration that would be used by institutions to ensure that, when bids are considered, reasonable steps are taken to prevent any form of bid-rigging.

- 5 In order to give effect to the above, the attached Certificate of Bid Determination (SBD 9) must be completed and submitted with the bid:

¹ Includes price quotations, advertised competitive bids, limited bids and bids.

² Bid rigging (or collusive bidding) occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and / or services for purchasers who wish to acquire goods and / or services through a bidding process. Bid rigging is, therefore, an agreement between competitors not to compete.

CERTIFICATE OF INDEPENDENT BID DETERMINATION

I, the undersigned, in submitting the accompanying bid:

(Bid Number and Description)

in response to the invitation for the bid made by:

(Name of Institution)

do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of: _____
that:

(Name of Bidder)

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign the bid, on behalf of the bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:
 - (a) has been requested to submit a bid in response to this bid invitation;
 - (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
 - (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder

SBD 9

6. 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 consortium³ will not be construed as collusive bidding.
7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
 - (a) prices;
 - (b) geographical area where product or service will be rendered (market allocation)
 - (c) methods, factors or formulas used to calculate prices;
 - (d) the intention or decision to submit or not to submit, a bid;
 - (e) the submission of a bid which does not meet the specifications and conditions of the bid; or
 - (f) bidding with the intention not to win the bid.
8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.
9. 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 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.

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.

.....
Signature

.....
Date

.....
Position

.....
Name of Bidder

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

NO.	DETAILS	TICK BY BIDDER
1.	Part 1: Completed and signed the invitation to bid document (SBD 1)	
2.	Part 2: Completed the pricing schedule (SBD 3.3)	
3.	Part 3: Completed and signed the declaration of interest document (SBD 4). <i>(In case of a consortium/ joint venture, or where sub-Service providers are utilised, each party to the bid <u>must</u> complete and sign the declaration of interest document)</i>	
4.	Part 4: Completed and signed the Preference Points Claim form in terms of the Preferential Procurement Regulations 2017 (SBD 6.1)	
5.	Part 5: Completed and signed the Declaration of bidders past Supply Chain Management Practices document (SBD 8). <i>(In case of a consortium/ joint venture, or where sub-Service providers are utilised, each party to the bid <u>must</u> complete and sign the Declaration of bidders past Supply Chain Management Practices document)</i>	
6.	Part 6: Completed and signed the Certificate of Independent Bid Determination (SBD 9)	
7.	Part 7: Submitted an original/ certified copy of a valid BBBEE Certificate. <i>(In case of a trust, consortium or joint venture, bidders will qualify for points for their B-BBEE status level as an unincorporated entity, provided that the entity <u>submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.</u></i>	
8.	Part 8: Submitted the General Conditions of Contract (initialled each page)	
9.	Part 9: Submitted the Technical approach	
10.	Part 10: Submitted the Details of the team and included their CV	
11.	Part 11: Submitted Experience in the field document and 3 reference letters	
12.	Part 12: Bidders National Treasury Central Supplier Database (CSD) forms indicating the validity of the bidder's registration	