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**REQUEST FOR QUOTATION: APPOINTMENT OF A SUITABLE SERVICE PROVIDER TO
PROVIDE INVESTMENT CONSULTING SERVICES TO THE NHBRC ON A MONTH-TO-MONTH
BASIS FOR A PERIOD NOT EXCEEDING TWELVE (12) MONTHS**

RFQ NO

: NHBRC RFQ 11/07

CLOSING DATE AND TIME

: 28 OCTOBER 2026 AT 11H00AM.

**PART A
INVITATION TO BID**

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE *National Home Builders*



Council: Ms Noxolo Kiviet (Chairperson) / Prof Mandlakhe Radebe (Deputy Chairperson) /
Ms Tamlyn Bouwer (Acting Chief Executive Officer) / Ms Nontuthuko Chiluvane /
Mr Donavon Goliath / Ms Renaire Huntley / Ms Mandy Jayakody / Prof Sijekula Mbanga / Mr
Lehlogonolo Masoga / Ms Siphindile Memela / Mr Kganki Matabane / Ms Zodwa Matiwane / Mr
Khulile Nzo / Ms Lucia Ngcobo / Ms Morwesi Ramonyai-Thonga

www.nhbrc.org.za

Registration Council (NHBRC)					
BID NUMBER:	NHBRC RFQ 11/07	CLOSING DATE:	28 OCTOBER 2026	CLOSING TIME:	11H00AM
DESCRIPTION	APPOINTMENT OF A SUITABLE SERVICE PROVIDER TO PROVIDE INVESTMENT CONSULTING SERVICES TO THE NHBRC ON A MONTH-TO-MONTH BASIS FOR A PERIOD NOT EXCEEDING TWELVE (12) MONTHS				
THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (MBD7) OR AGREEMENT OF FORM OF OFFER AND ACCEPTANCE.					

BID RESPONSE DOCUMENTS MAY BE EMAILED TO GODFREYK@NHBRC.ORG.ZA

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					
TAX COMPLIANCE STATUS	TCS PIN:		OR	CSD No:	
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE [TICK APPLICABLE BOX]	☐ Yes ☐ No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		☐ 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]**

1. ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	☐ Yes ☐ No [IF YES ENCLOSE PROOF]	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	☐ Yes ☐ No [IF YES, ANSWER PART B:3]
2. TOTAL NUMBER OF ITEMS OFFERED		3. TOTAL BID PRICE	R
4. SIGNATURE OF BIDDER		5. DATE	
6. CAPACITY UNDER WHICH THIS BID IS SIGNED			
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO:		TECHNICAL INFORMATION MAY BE DIRECTED TO:	
DEPARTMENT	National Home Builders Registration Council	CONTACT PERSON	Mr Abraham Chauke/Ms Ndo Motetesi
CONTACT PERSON	Dr Godfrey Khoza and Mr Kabelo Phalane	TELEPHONE NUMBER	011 317 0187
TELEPHONE NUMBER	011 317 0448/0115	FACSIMILE NUMBER	
FACSIMILE NUMBER		E-MAIL ADDRESS	Abrahamc@nhbrc.org.za and Ndof@nhbrc.org.za
E-MAIL ADDRESS	Godfreyk@nhbrc.org.za and Kabelo@nhbrc.org.za		

PART B

TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:

- 1.1. QUOTATIONS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE QUOTATIONS WILL NOT BE ACCEPTED FOR CONSIDERATION.
- 1.2. ALL QUOTATIONS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED)
- 1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017

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 VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.
- 2.3. APPLICATION FOR THE TAX COMPLIANCE STATUS (TCS) CERTIFICATE OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE WWW.SARS.GOV.ZA.
- 2.4. FOREIGN SUPPLIERS MUST COMPLETE THE PRE-AWARD QUESTIONNAIRE IN PART B: 3.
- 2.5. BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
- 2.6. IN QUOTATIONS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
- 2.7. WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.

3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS

- 3.1. IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? ☐ YES ☐ NO
- 3.2. DOES THE ENTITY HAVE A BRANCH IN THE RSA? ☐ YES ☐ NO
- 3.3. DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA? ☐ YES ☐ NO
- 3.4. DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA? ☐ YES ☐ NO
- 3.5. 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 ABOVE.

3.6.

NB: FAILURE TO PROVIDE ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

NO QUOTATIONS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE.

SIGNATURE OF BIDDER:

CAPACITY UNDER WHICH THIS BID IS SIGNED:

DATE:

IMPORTANT NOTICE

Bidders should ensure that quotations are sent/submitted timeously in the emailed address provided below. If the bid is late, it will not be accepted for consideration.

Submission of responses to the RFQ must be emailed to Godfreyk@nhbrc.org.za

All quotations must be submitted on the official forms – (not to be re-typed)

TECHNICAL ENQUIRIES

Should you require any further information in this regard, please do not hesitate to contact:

Name: Mr Abraham Chauke/Ms Ndo Motetesi

Office Telephone No.: 011 317 0187

E-mail: Abrahama@nhbrc.org.za/Ndof@nhbrc.org.za

APPOINTMENT OF A SUITABLE SERVICE PROVIDER TO PROVIDE INVESTMENT CONSULTING SERVICES TO THE NHBRC ON A MONTH-TO-MONTH BASIS FOR A PERIOD NOT EXCEEDING TWELVE (12) MONTHS

Delivery Deadline: ASAP

1 BACKGROUND

1.1 ABOUT THE NHBRC

1.1.1 The National Home Builders Registration Council (NHBRC) is a regulator established in terms of section 2 of the Housing Consumers Protection Measures Act 95 of 1998 ("the Act"). Section 3 of the Act provides that the objects of the NHBRC are to:

- (a) represent the interests of housing consumers by providing warranty protection against defects in new homes;
- (b) regulate the home building industry;
- (c) provide protection to housing consumers in respect of the failure of home builders to comply with their obligations in terms of this Act;
- (d) establish and to promote ethical and technical standards in the home building industry;
- (e) improve structural quality in the interests of housing consumers and the home building industry;
- (f) promote housing consumer rights and to provide housing consumer information;
- (g) communicate with and to assist home builders to register in terms of this Act;
- (h) assist home builders, through training and inspection, to achieve and to maintain satisfactory technical standards of home building;
- (i) regulate insurers contemplated in section 23 (9) (a); and
- (j) in particular, achieve the stated objects of this section in the subsidy housing sector.

1.2 NHBRC OFFICES

1.2.1 The NHBRC is a medium sized organization with a staff compliment of approximately 700

employees. The NHBRC's Head Office is located in Sunninghill, Gauteng, with nine (09) Provincial Offices of varying size and 12 Satellite Offices which are located in the following areas:

	NHBRC OFFICE LOCATIONS	#	NHBRC OFFICE LOCATIONS
1	Head Office, (Sunninghill)	13	Eastern Cape (East London) - Satellite
2	Gauteng (Tshwane Office)	14	Western Cape (George) - Satellite
3	Kwa-Zulu Natal(Durban) – Provincial	15	North West (Klerksdorp) - Satellite
4	Western Cape (Cape Town) – Provincial	16	Limpopo (Tzaneen) - Satellite
5	Eastern Cape (Port Elizabeth) – Provincial	17	Limpopo (Modimolle) - Satellite
6	North West (Rustenburg) – Provincial	18	Mpumalanga (Witbank) - Satellite
7	Limpopo (Polokwane) – Provincial	19	Free State (Bethlehem) – Satellite
8	Mpumalanga (Nelspruit) – Provincial	20	North West (Mafikeng) – Satellite
9	Free State (Bloemfontein) – Provincial	21	Limpopo (Thulamela) – Satellite
11	Kwa-Zulu Natal (Newcastle) - Satellite	22	Eric Molobi Innovation Hub (Soshanguve)
12	Kwa-Zulu Natal (Richards Bay) - Satellite		

2 INTRODUCTION

The National Home Builders Registration Council is mandated by the Housing Consumers Protection Measures Act, 1998 (Act No. 95 of 1998) to regulate the homebuilding industry and protect housing consumers. The NHBRC ensures that it delivers on its mandate by delivering on its products and services, and the key performance indicators that are contained in the organizational scorecard.

VISION

To be the Champion of the Housing Consumers.

MISSION

To Protect the Housing Consumers and to Regulate the Homebuilding Environment.

MOTTO

Assuring Quality Homes.

STRATEGY OF NHBRC

The strategy of the NHBRC is based on the following pillars:

- To ensure that housing consumers and home builders are educated on their rights and obligations.
- To entrench a culture of compliance through fair and efficient enforcement mechanisms

- To research and introduce innovative products, methods and technologies within the homebuilding industry.
- To maintain a sustainable warranty fund.

3 SERVICES PROVIDED BY THE NHBRC AND OTHER SIMILAR ORGANISATIONS

3.1 At present, the NHBRC is offering the following as part of the warranty cover for new homes:

- 3.1.1** 3-month workmanship;
- 3.1.2** 1-year roof leakage; and
- 3.1.3** 5-year structural warranty.

4 BUSINESS OVERVIEW

4.1 PURPOSE

- 4.1.1** To appoint a suitable Investment Asset Consultant with the appropriate expertise to provide consulting services to the NHBRC on the management of its Warranty Fund/ Investment.

5 SCOPE OF WORK

5.1 The scope of work for this consulting service is divided into 2 parts, and is as follows:

5.1.1 PART 1: Investment strategy:

- Review and maintenance of investment strategy based on the risk tolerance and return requirements of the NHBRC's warranty fund if requested;
- Advise the fund and finance committee on the implementation of Housing Consumer Protection Act of 2024;
- Conduct Asset Liability Modelling (ALM) modelling exercise if any changes in the Council's strategic scope, business objectives and risk appetite;
- Use the ALM results and advise on the appropriate strategic asset allocation, benchmark selection, back-testing, implementation and asset manager mandate specifications;
- Review the investment policy statement in line with changes suggested by the ALM or with the expansion to new asset classes in line with new Act;
- Review the ALM policy for implementation;
- Compile investment mandate annexures for inclusion in the portfolio management agreements between the Asset Managers and the NHBRC.

5.1.2 PART 2: Implementation of the approved investment strategy:

- Facilitate and guide Council in the selection of appropriate asset managers in order to achieve the approved investment strategy results;
- Monitor the asset managers to ensure compliance and performance against predetermined benchmarks and that investments are made in accordance with the approved investment policy;
- Negotiate fees with asset managers and monitor compliance with the approved fee structures;
- Issue instructions to asset managers as requested by Council;
- Facilitate any investments and disinvestments from asset managers;
- Perform annual due diligence on appointed fund managers and report back to Council.

5.2 Project Reporting

5.2.1 Prepare dashboards and reports which include, but are not limited to the following:

5.2.2 Council: Level 1 Reporting

- Attend quarterly Fund Advisory and Finance Committee and report on the market value of the fund;
- Changes in investments during the period under review;
- Investment performance for both the individual managers and consolidated portfolio against
 - Assigned benchmarks and peer group performance;
 - Top 10 holdings on each asset class;
 - Portfolio Compliance with investment strategy and relevant regulations;
 - Analysis of market trends and any review of the approved investment strategy;
 - Report on portfolio risk against the predetermined benchmarks and actual return on investments;
- Asset Managers fees in compliance with signed agreement;
- Report on the outcome of the due diligence conducted on the asset managers.

5.2.3 Executive Management Committee & Management Committee: Level 2 Reporting

- Monthly performance reports:
- Investment performance for both the individual managers and consolidated portfolio against assigned benchmarks and peer groups performance;
- Compliance of fund management fees as per signed agreement quarterly;
- Portfolio compliance with investment strategy and relevant regulations;
- Report on portfolio risk against the predetermined benchmarks and actual return on investments.

6 DURATION OF THE CONTRACT

6.1 The service provider and NHBRC will enter into a month on month contract limited to 12 months SLA on an effective date to be determined by the parties.

7 REPORTING

7.1 The report format will be agreed upon between the service provider and NHBRC Chief Financial Officer

7.2 The bidder must demonstrate in their proposal, their ability to provide automated reports at the request of the NHBRC within five (05) working days after the month end

7.3 The contract will be reviewed on an quarterly basis based on performance.

7.4 The service provider shall provide monthly, quarterly, and annual reports to management.

8 TECHNICAL AND PRICE EVALUATION CRITERIA

8.1 In accordance with the NHBRC Supply Chain Management Policy, the bid evaluation process shall be carried out in three (03) stages, namely:

8.1.1 Stage 1: Compliance check of Mandatory Requirements;

8.1.2 Stage 2: Functional Evaluation Criteria

8.1.3 Stage 3: Price and Preference Points Evaluation

DOCUMENTS TO BE SUBMITTED

No.	Bidders shall take note of the following bid requirements and documents to be submitted.	Yes/No
1.	Annexure A– Cost breakdown (including a detailed costing breakdown of all costs) . The Cost breakdown must be duly signed by the bidder/ and or a duly authorized individual by way of resolution (signature, not the bidder's initials), which must be attached to the bid. If there is no signature on the Cost breakdown down the bidder will be disqualified (Mandatory)	
2.	SBD 4 (Declaration of interest, make sure it is completed and signed)	
3.	SBD 6.1 (Preference claim form should be completed and signed, regardless if points are claimed or not)	
4.	The organisation or team leaders must be registered to Financial Advisory and Inter-Medary Act of 2002 (Act 37. Of 2002)	

NB: NHBRC will be using General Conditions of Contract (GCC) as issued by National Treasury and SLA for the management of the contract

Note 1: Bidders that do not comply with all the mandatory requirements will be disqualified.

Stage 2: Functionality in terms of the set technical evaluation criteria

Bids must fully comply with all the Mandatory Requirements for **Stage 1: Compliance check of Mandatory Requirements** in order to qualify for **Stage 2: Functional Evaluation** and those bids that fail to comply with all the requirements of Stage 1 will be invalidated or disqualified from the process.

Functionality Evaluation (Combination of Paper-Based and site inspection Criteria) = 80 points out of 100 points.

The Bidders information will be scored according to the following points systems:
The following values and formulae will be applicable when evaluating the bid
5=Excellent 4=Very good 3= Good 2= Average 1= Poor 0= Non-compliance
Member score for criteria _____ X Weight per criteria =
Total Score per criteria Highest points for criteria

PART 1

Item No	Evaluation Criteria	Description	Weight (%)
1.	Team Investment Knowledge and Skills:	The Bidder MUST provide the team that will be involved in the NHBRC assignment (Please attach a CV, Certified copy of qualification not older than six months) <u>Team Leader Must at least have one of the following qualification</u>	30

Item No	Evaluation Criteria	Description	Weight (%)
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		1. Bachelor's degree in economics/finance/ Investment/Econometrics or related field <u>Scoring for Team experience, qualification</u> • No experience and qualification= 0 Points • 3 years of experience and qualification = 1 point • 5 years of experience and qualification = 2 Points • 5 to 10 years of experience and qualification = 3 Points • 10 to 14 years of experience and qualification = 5 Points • 15 years of experience and more and qualification = 5 Points	
2.	Company experience in consulting services on the management of its Warranty (insurance) Fund/ Investment	The Bidder MUST have experience in consulting services on the management of its Warranty (insurance) Fund/ Investment Services and support. Company profile must clearly indicate the number of years in business providing consulting services on the management of its Warranty (insurance) Fund/ Investment and support. (Please attach a company profile that includes a list of projects that demonstrate relevant experience) <u>Company Experience</u> • No experience = 0 Points • 1 to 2 years' experience = 1 Points • 3 to 5 years' experience = 2 Points • 6 to 7 years' experience = 3 Points • 8 to 10 years' experience = 4 Points • 10 years' experience and more = 5 Points	10

3.	Client References (Track record)	The service provider must provide positive written contactable references (Excluding the NHBRC) indicating a track record with short-term insures. The reference letters MUST be from 2018 till to date The reference letters from the clients of a bidder must include: • Company name • Company letterhead • Contact person and contact telephone numbers • Reference letters MUST indicate the period when the project was executed • The letter must be signed by a duly authorized person	20
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Item No	Evaluation Criteria	Description	Weight (%)
		<u>Reference Letter Scoring</u> • 0 Reference letter under advice = 0 Points • 1 Reference letters and less than R 1 billion = 1 Point • 2 Reference letters and over R 2 billion = 2 Point • 3 Reference letters and over R 3 billion = 3 Point • 4 Reference letters and over R 4 billion = 4 Point • 5 Reference letters and over R 5 billion = 5 Point The NHBRC reserves the right to verify the validity of the document submitted.	

4.	Reporting Capabilities	The bidder must demonstrate in their proposal, their ability to provide automated reports at the request of the NHBRC within five (05)working days after month end • Undertaking to provide reports in more than 30 working days= 0 Points • Undertaking to provide reports in more than 20 working days= 1 point • Undertaking to provide reports in more than 15 working days= 2 Points • Undertaking to provide reports in more than 10- 15 working days= 3 Points • Undertaking to provide reports in more than 5- 10 working days= 4 Points • Undertaking to provide reports in more than 5 working days or less = 5 Points	20 Points
5.	Independence of service provider	The bidder must Provide revenue split by division and function, clearly stating the sources of each stream of revenue • Below 51% from consultant services = 0 Points • 51% to 54% from consultant services = 1 Points • 55% to 59% from consultant services = 2 Points • 60% to 69% from consultant services= 3 Points • 70% to 79% from consulting services = 4 Points • Above 80% from Consulting Services = 5 Points	20 Points
TOTAL			100 Points
MINIMUM QUALIFYING REQUIREMENT			80 Points

The minimum threshold for functionality is 80 points or greater out of 100 points. Bidders who fail to meet minimum threshold will be disqualified and will not be evaluated further for price and preference points.

STAGE 3: PRICE AND PREFERENCE POINTS EVALUATION

	Market Values
NHBRC Market Value	
National Home Builders Registration Council confirmed values	10 861 171 959
NHBRC Equity Portfolio	790 560 409
NHBRC Bond Portfolio	2 840 815 139
NHBRC Money Market Portfolio	4 510 075 225
NHBRC Structured Products Portfolio	1 900 000 000
CPD Account	
CPD and Call Accounts	819 721 186

The fee structure will be based on the basis points charge on the total portfolio

Only bids that achieve minimum qualifying score **80 points** or more for **Stage 2 (Functional Requirements)** will be evaluated further.

The contract will be awarded in terms of Regulations 4 of the Preferential Procurement Regulations pertaining to the Preferential Procurement Policy Framework Act, 2000 (Act 5 of 2000) and Preferential Procurement Regulations, 2022 and bids will be adjudicated in terms of a (80/20) preference point system in terms of which points are awarded to bidders on the basis of:

80/20 Preference point system (for acquisition of services, works or goods with a Rand value equal to or below R50 million) (all applicable taxes included)

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

Where;

P_s = Points scored for comparative price of bid or offer under consideration

P_t = Comparative price of bid or offer under consideration

P_{min} = Comparative price of lowest acceptable bid or offer.

The points scored will be rounded off to the nearest two decimal places.

The points will be awarded to a Bidder in accordance with the table below:

A maximum of 20 points may be awarded to a bidder for Preference Points specified in the tender.

Preference Points	Points Allocated
Women-owned companies	12
Youth-owned companies	6
People living with disabilities owned companies	2
TOTAL	20 Points

The following formula must be applied to calculate the number of points for preference points

$$NEP = NOP \times \frac{EP}{100}$$

Where:

NEP = Points awarded for equity ownership Preference Points

NOP= The maximum number of points awarded for

Preference Points EP = The percentage of equity ownership

The points scored for price will be added to the points scored for preference points to obtain the Bidders total points scored out of 100 points.

**SBD 6.1 PREFERENCE SCHEDULE
PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT
REGULATIONS 2022**

PRICE QUOTATION PROCESS (UP TO R 1 MILLION)

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

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

1. GENERAL CONDITIONS

- 1.1 The following preference point systems are applicable to invitations to tender:
- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and

1.2 **To be completed by the organ of state-**

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

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

- (a) Price; and
- (b) Specific Goals.

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

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	100

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

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

1.7 Bidders who wish to claim points in terms of table 4.2 below need to provide proof for each point claimed as guided below:

- Who is female- **attach certified copy of identity document (ID) and company registration document / CSD report to show/ substantiate percentage ownership equity.**
- Who is youth - **attach certified copy of identity document (ID) and company registration document / CSD report to show/ substantiate percentage ownership equity.**
- Who has a disability – **attach doctor's letter confirming the disability**

2. DEFINITIONS

- (a) **“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;

- (b) “**price**” means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) “**rand value**” means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) “**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
- (e) “**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 OR 90/10 PREFERENCE POINT SYSTEMS

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

80/20	or	90/10
$Ps = 80 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)$	or	$Ps = 90 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)$

Where

Ps = Points scored for price of tender under consideration
 Pt = Price of tender under consideration
 Pmin = Price of lowest acceptable tender

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

4.1 POINTS AWARDED FOR PRICE

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

80/20	or	90/10
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$$P_s = 80 \left(1 + \frac{P_t - P_{max}}{P_{max}} \right) \quad \text{or} \quad P_s = 90 \left(1 + \frac{P_t - P_{max}}{P_{max}} \right)$$

Where

- P_s = Points scored for price of tender under consideration
 P_t = Price of tender under consideration
 P_{max} = Price of highest acceptable tender

5. POINTS AWARDED FOR SPECIFIC GOALS

- 5.1 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:
- 5.2 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 90/10 and 80/20 preference point system.

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

(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.)

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

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system)	Percentage ownership equity (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
I. Women owned companies	12		
II. Youth owned companies	6		
III. People living with disabilities owned companies	2		

The following formula will be applied to calculate the number of points for preference points:

$$NEP = NOP \times \frac{EP}{100}$$

Where

NEP = Points awarded for equity ownership Preference Points

NOP= The maximum number of points awarded for Preference Points

EP = The percentage of equity ownership

DECLARATION WITH REGARD TO COMPANY/FIRM

5.3 Name of company/firm.....

5.4 Company registration number:

5.5 TYPE OF COMPANY/ FIRM

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

[Tick applicable box]

5.6 I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;

- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 - (a) disqualify the person from the tendering process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the audi alteram partem (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution, if deemed necessary.

.....
SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME:

DATE:

ADDRESS:

BIDDER'S DISCLOSURE (SBD4)

1. PURPOSE OF THE FORM

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

Where a person/s are listed in the Register for Tender Defaulters and / or the List of

Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise,

employed by the state?

YES/NO

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

Full Name	Identity Number	Name of State institution

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

2.2.1 If so, furnish particulars:

.....
.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

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

2.3.1 If so, furnish particulars:

.....
.....

3 DECLARATION

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

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or 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.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to quotations and contracts, quotations 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

² 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.

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

CONTRACT FORM - RENDERING OF SERVICES

THIS FORM MUST BE FILLED IN DUPLICATE BY BOTH THE SERVICE PROVIDER (PART 1) AND THE PURCHASER (PART 2). BOTH FORMS MUST BE SIGNED IN THE ORIGINAL SO THAT THE SERVICE PROVIDER AND THE PURCHASER WOULD BE IN POSSESSION OF ORIGINALLY SIGNED CONTRACTS FOR THEIR RESPECTIVE RECORDS.

PART 1 (TO BE FILLED IN BY THE SERVICE PROVIDER)

1. I hereby undertake to render services described in the attached bidding documents to (name of the institution)..... in accordance with the requirements and task directives / proposals specifications stipulated in Bid Number..... at the price/s quoted. My offer/s remain binding upon me and open for acceptance by the Purchaser during the validity period indicated and calculated from the closing date of the bid.
2. The following documents shall be deemed to form and be read and construed as part of this agreement:
 - (i) Bidding documents, viz
 - Invitation to bid;
 - Pricing schedule(s);
 - Filled in task directive/proposal;
 - Preference claims for Broad Based Black Economic Empowerment Status Level of Contribution in terms of the Preferential Procurement Regulations 2017;
 - Declaration of interest;
 - Declaration of Bidder's past SCM practices;
 - Certificate of Independent Bid Determination;
 - (ii) General Conditions of Contract; and
 - (iii) Other (specify)
3. I confirm that I have satisfied myself as to the correctness and validity of my bid; that the price(s) and rate(s) quoted cover all the services specified in the bidding documents; that the price(s) and rate(s) cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.
4. I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this agreement as the principal liable for the due fulfillment of this contract.
5. I declare that I have no participation in any collusive practices with any bidder or any other person regarding this or any other bid.
6. I confirm that I am duly authorised to sign this contract.

NAME (PRINT)

CAPACITY

SIGNATURE

WITNESSES

1

2

DATE:

NAME OF FIRM

DATE

SBD 7.2

CONTRACT FORM - RENDERING OF SERVICES

PART 2 (TO BE FILLED IN BY THE PURCHASER)

1. I..... in my capacity as..... accept your bid under reference numberdated.....for the rendering of services indicated hereunder and/or further specified in the annexure(s).
2. An official order indicating service delivery instructions is forthcoming.
3. I undertake to make payment for the services rendered in accordance with the terms and conditions of the contract, within 30 (thirty) days after receipt of an invoice.

DESCRIPTION OF SERVICE	PRICE (ALL APPLICABLE TAXES INCLUDED)	COMPLETION DATE	B-BBEE STATUS LEVEL OF CONTRIBUTION

4. I confirm that I am duly authorised to sign this contract.

SIGNED AT ON

NAME (PRINT)

SIGNATURE

OFFICIAL STAMP

WITNESSES

1
2
DATE: